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FOREIGN TRADE

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Right Hon. C. D. Howe
Minister of Trade and Commerce

M. W. Mackenzie
Deputy Minister

FOREIGN TRADE

OTTAWA, MAY 21, 1949

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COVER SUBJECT—Hydro-electric power station at Deer Lake, 32 miles from Corner Brook, of Bowater's Newfoundland Pulp and Paper Mills, Limited, in which was installed during 1948 one of the fastest paper-making machines in the world. Exports of newsprint and paper in the twelve months ended March, 1948, were valued at $25,729,000, which represents 32 per cent of the total exports from Newfoundland. Shipments to the United States were valued at $13,015,000; to Canada, at $5,713,000; and to other countries at $7,001,000.

National Film Board Photo.

Price 10 cents

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Canada Biggest Single Source of Supply for the United Kingdom

Eleven per cent of imports obtained from this country, President of British Board of Trade declared in Ottawa—Big increase in exports from sterling area essential to maintain present rate of flow—Britain's responsibilities in recovery of Western Europe outlined.

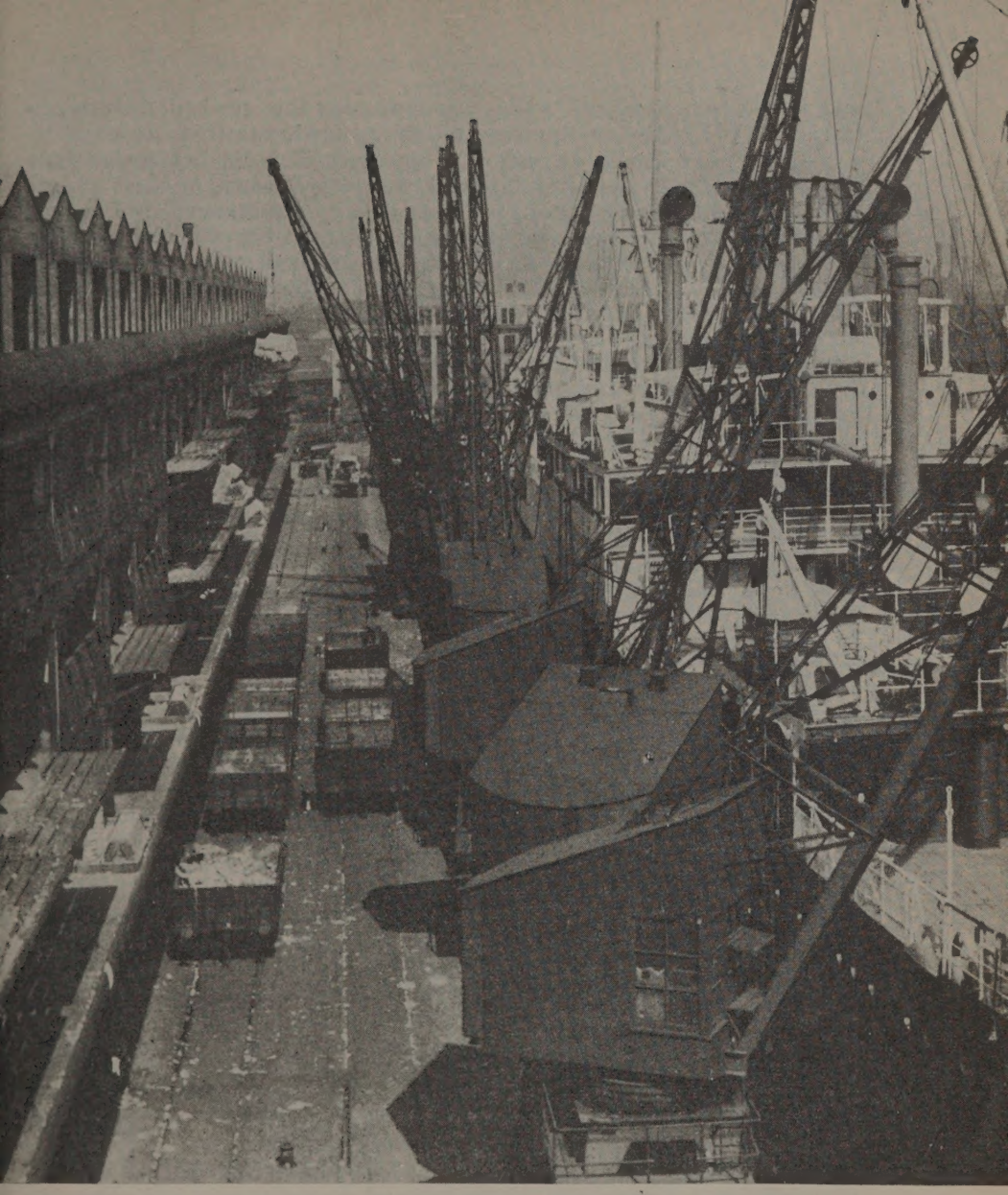
"THERE is an impression widely held in Canada that, as a result of mistaken or wrong-headed policies in London, Canadian manufacturers and producers are being driven from their traditional markets," declared the Right Hon. James Harold Wilson, President of the British Board of Trade, in addressing businessmen and others attending the 170th District Conference of Rotary International, held in Ottawa on May 16, 1949. "If my visit does no more than provide some re-assurance on this, and if during my visit I succeed in convincing Canadians that we do not seek our economic destiny elsewhere to the exclusion of Canada, it will not have been in vain.

"Canada is today what she has never been before, our biggest single source of supply, accounting now for 11 per cent of our imports, as against only 9 per cent before the war. Even in the case of some of those commodities whose purchase we have had to limit through lack of dollars, we are devoting a higher proportion of our total expenditure to Canadian produce than before the war," he said. "Of the total amount we spent last year in bringing timber to our shores, Canadian timber accounted for nearly 34 per cent. In the five years before the war, Canadian timber accounted for only 18 per cent. Similarly with wheat and bacon, a far higher proportion of our imports are coming from Canada than before the war.

"I know full well, and this is a matter which is causing almost endless thought to me and to my colleagues in the United Kingdom cabinet, the cause of those fears which have been expressed. We are not buying nearly as many things in Canada as Canadians would like to sell. We have had to scale down, or stop altogether, the purchase of certain commodities such as timber or apples, for which you have no other ready market, though Mr. Howe here in Ottawa last week, and the Secretary of State for Commonwealth Relations in London announced what we hoped to do from our extremely limited resources in the shape of additional purchases of a range of goods, including timber, apples and canned salmon. But we are very well aware that, in many cases, the producers concerned have gone to great trouble to adapt their output to what they supposed would be our continuing needs. Yet, because of our balance of payments position, we are unable to take those products, many of them goods which not only the United Kingdom Government, but most assuredly the consumers and housewives of the United Kingdom, would only be too glad to have.

Increased British Exports Essential

"So it is only by the hard road of increased exports in this market that we can hope to take more from Canada. Indeed, a big increase in exports from both the United Kingdom and the rest of the sterling area will be needed even to maintain the present rate. It is by such an increase of our exports and not through any easy solution or hope of miracle that our salvation will come. There is in fact no easy solution to this problem of trade between our two countries, no miraculous way of turning our sterling surplus with other countries into the dollars we need.



Great Britain—Raw cotton, which provides the United Kingdom with a substantial part of her exports, being unloaded in Manchester. British imports of raw cotton last year were valued at £106,760,000, and exports of cotton yarns and manufactures at £131,178,000.

Photo by Stewart Bale, Limited.

"There are those, I know, in both our countries, who feel that there is some inherent error in our trading policy which, if put right, would solve almost overnight the Anglo-Canadian trade problem. There is, for instance, a disposition which makes itself felt both in this country and in Britain to suggest that all our difficulties and all Canada's difficulties would disappear if we should turn away from our so-called bilateral trading in Europe and concentrate instead on the Canadian market. Why, you ask, do we export steel to Scandinavia and Eastern Europe, in return for grain

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and timber and woodpulp when, you may say, this steel, if diverted to Canada would enable us to obtain all our requirements from there.

"I realize I should be failing in my duty if I did not spend some time putting those so-called bilateral trade agreements in their proper setting. Let me take you back for a moment to the autumn of 1947, a year of growing economic crisis for Britain, and indeed the whole world. We in Britain had faithfully tried to implement our undertaking to introduce multilateral, non-discriminatory trade, with full convertibility of sterling. Apart from North American countries and one or two neutral countries in Europe we stood almost alone in this brave attempt. As you know, we had gone ahead in this direction too far and too fast, and we were forced to suspend convertibility of the pound sterling into dollars. In those circumstances, we were faced with the necessity of doing two things, first of all to develop the resources of the sterling area, in order to speed national and world recovery in an attempt to widen once again the area in which sterling was freely accepted, as one step towards world-wide acceptance of sterling. Secondly, we had to speed the recovery of Western Europe by a system of special trading arrangements. In those conditions bilateral agreements were not only an essential preliminary to the re-establishment of a world trading system, they were a necessary condition of economic survival.

Responsibilities to Europe Cited

"There were countries in Western Europe starving for want of coal and steel and other materials which, though themselves perfectly capable of consuming all their own supplies of timber for physical reconstruction and foodstuffs for home consumption, were willing to ration those commodities at home and to export them only on condition that in return they could count on our sending them the minimum supplies of coal and steel and engineering products necessary to keep their economy alive. We, for our part, short of coal as we were in 1947, before our mounting production made available surpluses for export and, chronically short of steel, were willing to export these materials only if we could know that by so doing we could ensure the supplies of timber and foodstuffs which we needed even more. The alternative to bilateral arrangements in those days would have been a Britain living on an impossibly low standard of food consumption, with the housing program completely held up for lack of timber, since we were already buying all the timber then available in Canada and the United States. It would have meant, on the other hand, European countries consuming their own products, but with their economies brought to a standstill through lack of coal and steel.

"I need not remind you that we in Britain had and still have a real responsibility for promoting the recovery of our neighbours in Europe. To have shirked that responsibility would not only have retarded world recovery, but would have made many countries in Europe a breeding ground for political disease of the most malignant character.

"I cannot too strongly stress that, even in those days of 1947 and early 1948, our bilateral arrangements were in no sense barter deals of steel against timber, or machinery against grain or tinplate against salmon. In every case, sales of scarce goods, steel to Sweden or Finland, and so on, represented only a very small proportion of our total imports of timber, woodpulp and foodstuffs and other requirements from those areas. The main weight of the goods we have received from them has been paid for, not in steel or other commodities marketable in Canada but by sterling area goods in easy supply, such as rubber or wool, or by manufactured goods from the United Kingdom which could not otherwise have been sold in

Canada. The steel and coal—not anthracite—which we supplied were only the minimum conditions of an agreement; they were not the means of payment. If the whole of our steel shipments to the timber-producing areas of Northern and Eastern Europe, for example, had been diverted to Canada, they would not have paid for more than a small proportion of our timber needs. Indeed, the total value of our steel shipments to those areas paid for less than one-tenth of the timber we imported, quite apart from woodpulp, foodstuffs, metals and other imports which flowed into Britain through normal trade channels under those bilateral arrangements.

"So it is with tinplate. Criticism has been made of a contract signed some time ago with the Soviet Union for canned salmon and crab. It has been suggested that tinplate was sent to Russia to pay for the fish which was put inside it. Obviously it was not; it was used simply to can fish, cheap fish, for which we were paying in sterling as a result of Russia's purchases of sterling area products on free world markets, and to a small extent of engineering goods, none of which were diverted from the Canadian market.

Trade Reverting to Ordinary Channels

"More recently, our bilateral arrangements with European countries have been liberalized and made freer; less and less are we undertaking to supply any scarce goods; more and more trade is reverting to ordinary commercial channels. In the vast majority of cases our trading arrangements with European countries are now no more formal, no more planned or controlled than our trading arrangements with Canada.

"Our period of bilateral trading arrangements has not diverted goods from Canada which would otherwise have gone there. Indeed, during that period, the proportion of new steel going to Canada has greatly increased. In 1948, the proportion was far greater than in 1946, and in 1949 we hope to ship more than three times as much as in 1948. In fact, one result of the bilateral arrangements, in the view of His Majesty's Government, has been that less scarce goods, steel and so on, have gone to some of those markets than would have been the case with uncontrolled and unplanned commercial arrangements. I want to repeat today what I have already said; in none of our bilateral agreements have we subordinated the interests of Canada to those other countries; nor shall we do so. His Majesty's Government does not regard the bilateral method of trading as a permanent instrument of policy. Our export trade is far too diverse and variegated to be capable of planning on bilateral lines. Like our Canadian and United States friends, we all look forward to the establishment as quickly as possible of a world trading system in which multilateral trade and convertible currency can play their full part. But the world is sadly out of balance and much needs to be done before we can reach that goal which we have all set ourselves.

"And the world can be put in balance only by the most extensive efforts on the part of the non-dollar area to increase their sales to Canada and the United States. This is a task which has I think set such a challenge to our government and to our industry and trade. But equally it represents a challenge to the Canadian people.

Permanent Market in Canada Noted

"I have heard reference to a so-called 'Iron Curtain' or picket fence between the dollar and the sterling areas. Certainly, over the dollar-sterling exchange frontier, difficulties of the gravest kind exist. In so far as there is a curtain, and in so far as there is a picket fence, it is one made up to quite a large extent of ignorance of what can be achieved.

The Gilpin Mission to Canada on engineering products, the publication of whose report is probably one of the most important events in Anglo-Canadian trade, has drawn attention to the lack of realization on the part of our own exporters in the engineering trade of the great market which exists for their products in Canada, a market whose exploitation represents not only a short-term national need, but one which should be regarded by our traders as representing a long-term and indeed permanent demand for their products. In saying this I am not thinking only of engineering, which itself forms only a small part of our exports to Canada, but of textiles and the wide range of industrial products and consumer goods which we are ready and anxious to supply.

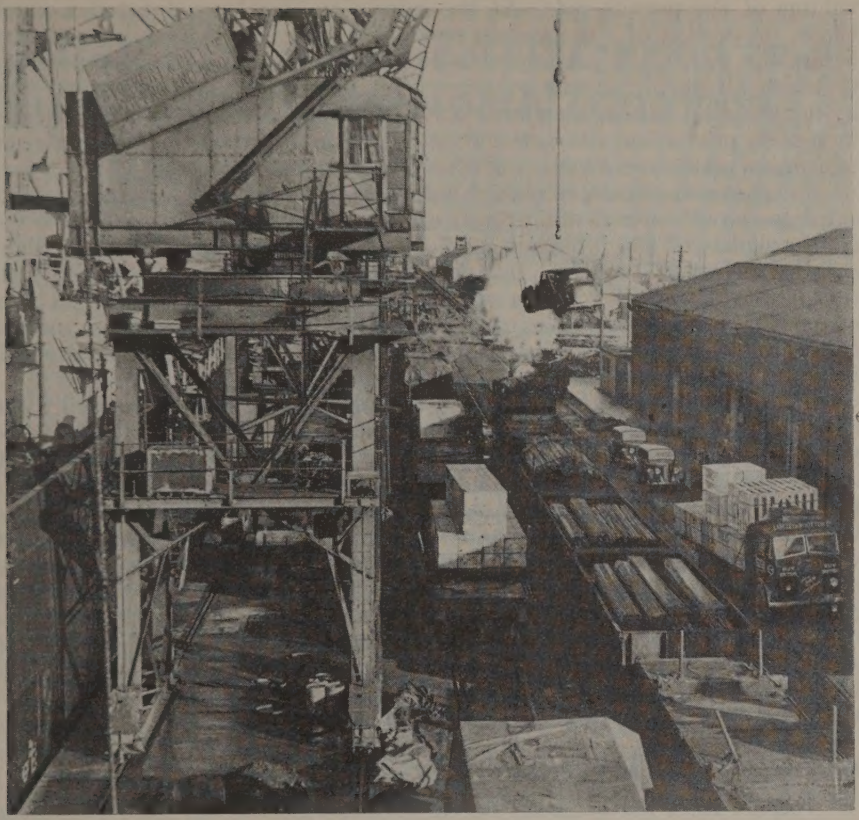
"It is equally in the interests of our traders, concerned as they must be with finding suitable long-term markets, as of the country, that there should be a great and sustained increase in our exports to Canada. It is a market, the friendship and goodwill of which no one would for one moment doubt. It is a market, the size and potentialities of which can never be in doubt. With the great consuming power of this prosperous area, with the great industrial developments going on, with the great and expanding consumers' market which exists for manufactured goods, there is every opportunity for every type of export from the United Kingdom. Our exporters must get away from the idea that the Canadian market is falling like a ripe plum into the laps of the exporters of other countries on Canada's doorstep.

"But equally, if our joint problem is to be solved, as everyone in our two countries is agreed it must be solved, it is reasonable to ask the Canadian buyer, whether private industry or public utility, whether wholesaler or retailer, to consider what Britain can send and not to fall too easily into the belief that we are not to be regarded as a potential supplier. In the engineering field particularly, many Canadian buyers, including those concerned with the great new developments of the postwar era, seem not to have considered the possibility of placing their orders in the United Kingdom. Our industries in 1949 are re-deploying themselves in the interests of Canada's needs. Difficulties of time and distance—so crucial to engineering servicing, to consultant services, and the provision of spares—have been virtually eliminated by the transatlantic plane, the express air service and the radio telephone.

Solution of Problem in Market Places

"In other words, we would wish you to be willing buyers as we intend to be willing sellers. Trade is made up of an infinity of contacts between businessmen. If, therefore, you in Canada will consciously and systematically make every effort to buy in the United Kingdom, you as individuals will be playing your part in the solution of our mutual problems. In other words, the solution of the Anglo-Canadian trading problem is to be found not so much in London and Ottawa, but in the market places of our two countries; it is a question for Montreal and Manchester, for Toronto and Birmingham, for the Prairie Provinces of Canada and the agricultural machinery centres of Britain.

"What more we can do, what message I must take home to our manufacturers and traders, our designers and workers and salesmen, I hope to learn in the next three weeks. But of this I am certain. Throughout Canada, as throughout Britain, there must grow up a realization that our two economies are complementary, and that with goodwill and a proper realization of one another's difficulties, each has a great contribution to make to the rebuilding of this war-shattered world, to the industrial development of both our countries, and to that raising of the standard of life of our peoples to the level we all desire to see."



Great Britain—Motor vehicles and other general cargo awaiting shipment to Canada.

In tracing the postwar problem of Great Britain, Mr. Wilson said that the country faced in 1945 the gravest crisis she had ever known in peacetime; a challenge that was no less grave than that which she faced after Dunkirk. "Not only had the war shattered our factories and homes, it left our civilians tired with the strain of broken nights and continuous overtime, and lend-lease had come to an end. We had lost many of our overseas investments, which before the war had provided the means of payment for nearly one-third of our essential imports; we had lost, too, over one-half of our merchant fleet and many of our markets were lost as a result of our concentration on the part assigned to us as an advance fighting base and a centre of munitions production. Yet, in this situation we had to repair the physical damage of war and undertake a vast program of capital re-equipment in our basic industries to make good both what we had left undone during the war and the neglect of the prewar years. Britain, a nation dependent more than any other on imports for its food supplies and raw materials, had to build up its trade again in a world of crippling shortages, in a world in which the prices of our imports had risen far more than the prices of our exports, turning the terms of trade against us in a manner worse than we had known for a century past.

"Our record achievement since the end of the war, in the face of these difficulties, is one of which we can be proud. As a result of the sacrifices and hard work of the British people, we have achieved a rate of exports which in two months of this year has already exceeded 160 per cent by

volume of the prewar rate. At the same time, we have devoted a much bigger proportion of our national production to capital re-equipment than before the war, while yet implementing in full the social security program to which all parties in our country were committed. This has been done by maintaining austere standards on the home market and by dramatically increasing production and national output, which in recent months has risen to a figure more than 40 per cent above what it was before 1935.

"Our export efforts, combined with a welcome recovery in our invisible earnings, have restored our overall national balance of payments position from a deficit of $2½ billion in 1947 to an overall balance, indeed a slight surplus in recent months. But within this achievement of paying our way in total there still remains what is for us the greatest economic problem of our time, the deficit with the dollar areas. In spite of the most intense efforts to increase our exports to Canada and the United States, we are still very far indeed from solving this problem.

"In fact, our exports to Canada and the United States, assuredly the most difficult markets in the world, have more than doubled in the last two years. Although our exports to Canada alone have increased from $130 million in 1946 to $188 million in 1947, and $280 million in 1948, and have recently been running at a yet higher figure, we are still a very long way from closing our gap with Canada. In fact, our net payments deficit last year was over $470 million. Our exports were paying for only 35 per cent of our Canadian dollar outgoings. Before the war, when our exports paid for a still smaller proportion of our payments to Canada, the gap was bridged by the net earnings of the sterling area—gold, wool, rubber, tin and cocoa—which were sufficient not only to cover our deficit with the United States but also to provide a surplus of United States dollars with which to finance our payments deficit with Canada.

Two Sources of Dollars Available

"Apart from the generous line of credit, which in our need you made available to us, we have today only two sources of acquiring dollars, either through the timely and statesmanlike generosity of the United States people in making off-shore dollars available under the European Recovery Program for purchases in Canada, or through the proceeds of United Kingdom or sterling area direct sales to Canada.

"We are already using the off-shore dollars obtained from ERP, and all the dollars we earn ourselves by our direct exports, on purchases in Canada. To extend those purchases could be done only by encroaching further on our gold and dollar reserves, which are already at the minimum level necessary for safety, and must be regarded as the last line of defence not only of the United Kingdom but of the whole sterling area. We must face the fact that the United States off-shore dollar program will progressively decline between now and 1952. So, unless we can increase our direct earnings of dollars faster than the off-shore dollars decline, not only shall we be unable to increase our program of purchases from Canada, we shall not even be able to maintain the present rate. It is this plain fact, and not any other, which is responsible for our present inability to buy from Canada all that Canada would wish to sell and we, for our part, would wish to buy."

During the course of a press interview in Ottawa, Mr. Wilson indicated that British exports to certain countries in the Soviet sphere of influence were considerably less than shipments to Canada. For instance, compared with exports valued at $280,500,000 to Canada last year, Great Britain shipped goods to the U.S.S.R. valued at $21,400,000; to Czechoslovakia, at $22,200,000; and to Poland, at $29,000,000. He also declared that the United Kingdom did not expect to buy wheat from Russia this year.

British Industries Encouraged to Boost Exports to North America

Producers to be given every assistance—Costs will be reduced and quality of goods improved wherever possible—Production in past year rose by 12 per cent, with increase in labour force of only two per cent—Balance of payments position still grave.

By A. E. Bryan, Commercial Counsellor for Canada

(Editor's Note—This is the first of two articles on economic prospects of the United Kingdom during 1949, prepared for *Foreign Trade*.)

LONDON, April 15, 1949.—Efforts will be made during the current year to expand still further the volume of British exports to Canada and the United States. Production, especially in the key industries of coal, steel, textiles and agriculture, will be given every encouragement. Costs, particularly of export materials, will be reduced and the quality of goods improved wherever possible. The battle against inflation will continue with the weapons used so successfully during the past two years. These represent objectives of the British Government in its economic program, which is based on a recent survey of conditions during the past year.

Progress was achieved during the past year. Assistance secured under the European Recovery Program stimulated the reconversion of industry, and production rose by 12 per cent, though the labour force increased by only two per cent. Productivity improved through the introduction of new techniques, the employment of new equipment and the creation of working stocks.

Output rose in all the main sectors of home industry. There were substantial rises in coal and textiles, although the target figures were not quite reached. The increase in coal production permitted a resumption of exports on a significant scale. Agricultural output was higher in every branch. The great increase in steel output, which exceeded even the raised target, enabled production to expand in many investment and export industries.

The volume of imports rose by about four per cent above 1947 to more than four-fifths of the prewar level. The proportion of these imports originating in the Western Hemisphere, which was nearly one-half in 1947, was reduced to one-third in 1948.

The volume of exports was 25 per cent above 1947 and the largest since 1929. There were increases in every class of exports to every type of market and, in contrast to imports, there was little change in the proportions of exports going to the different areas.

The terms of trade, however, continue to deteriorate. Nevertheless, in the latter half of the year, exports and re-exports were sufficient to pay for over 90 per cent of imports compared with about 70 per cent in 1947 and a little less in 1938.

Balance of Payments Position Still Grave

When account is taken of an immense improvement in the balance of invisible payments, the overseas deficit in 1948 is provisionally estimated at only £120 millions, an improvement of over £500 millions in the course of a single year. The preliminary figures for the last six months show that

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the United Kingdom probably then had a small surplus on current account. But the overall figures conceal the gravity of the Western Hemisphere deficit, which was halved in 1948 but was still nearly £350 millions. The deficit, which is admitted to be the worst danger spot in the economy, was made good in the first half of the year, largely by drawings on the United States and Canadian credits and later by receipts of £170 millions under ERP. There was only a small fall in gold and dollar holdings during the year.

In spite of the success of the export drive, total real resources available for use at home were more in 1948 than in 1947. It was possible to improve capital equipment without sacrifice to the standard of living and without aggravating the inflationary pressure.

Wage rates continued to rise but only moderately, while prices remained approximately stable during the last nine months of the year.

However, the position is still dangerous in a number of critical sectors. Above all, the country at the end of the year was still far from paying for all dollar imports from current dollar earnings.

The United Kingdom authorities recognize that it is unrealistic to expect that 1949 will improve on 1948 as markedly as did 1948 on 1947. There was exceptional disorganization in 1947, due to the fuel crisis, as well as the fact that reconversion had not been completed. In fact, the rate of increase of industrial production tended to lessen after the autumn of 1947. Future progress will result from technical advances, new capital equipment, improved organization, steadier and more productive work, and not from an increased labour force and the gathering of the fruits of reconversion in earlier years.

Urgent Need for Further Increase in Coal Output

Coal—The need for a further increase in coal output in 1949 is urgent, both for home consumption and exports, as part of the organization for European Economic Co-operation program. It is estimated that total output in 1949 should be between 215 and 220 million tons, which represents an increase of from 7 million to 12 million tons above 1948.

More coal will be required in 1949 by the iron and steel industries, by engineering and other industries and to satisfy the rising trend of gas and electricity consumption. It is estimated there will be from 17 million to 20 million tons available for export and bunkers.

Electricity—The problem of electricity is still the gap between peak demand and available generating capacity. About 1,000 mw. of new plant is likely to be commissioned in 1949, but the net increase in capacity is unlikely to be much in excess of the growth in demand. The situation still calls for the greatest endeavour to increase capacity and for consumers to reduce consumption at times of peak demand.

Steel—Continued expansion of output during the next three or four years is said to be essential to the success of the country's economic and industrial policy. Long-term plans aim at an output of about 17½ million ingot tons in 1953-54.

Indications are that the demand both for export and for home investment will remain intense in 1949 and that excess of demand over supply will continue to impose limitations on various parts of the industrial effort.

New blast and steel furnaces will come into operation this year, but scarcities of raw materials, coke, imported ore and scrap may limit output.

In the most favourable circumstances output should in 1949 be between 15¼ and 15½ million tons of ingot steel. There will not be a corresponding

improvement in supplies of certain products, especially sheet, strip, tinplate and wire rod where output is restricted by finishing capacity. Exports are likely to rise slightly from 1·5 to 1·6 million tons.

Textile Production Targets Set at High Level

Textiles—The survey emphasizes the need for further expansion in 1949. The production targets, therefore, have been set at a high level, but do not represent the full increase that is desirable. The major limitation on raising textile output will be the supply of labour. The 1948 export targets for cotton were attained, but output increased less than was planned and the home market had to be deprived of supplies. The domestic shortage of cotton garments and household textiles will inevitably continue for some time.

Exports of woollen textiles in 1948 fell far short of the target and the 1949 target has been lowered to a figure still above current exports. There is believed to be still an unsatisfied demand in hard-currency markets for better quality worsteds.

Output of spun rayon yarns and continuous filament yarns should continue to expand largely as the result of new capacity.

Agriculture—The program provides for further increases both in total acreage under crops and in the output of livestock products. Last year's wheat target was not attained and, because exceptionally heavy potato and beet crops and the late cereal harvest delayed fall wheat sowing, the prospect of an increase of 250,000 acres has diminished. The program for coarse grains should be realized.

Targets and Estimated Agricultural Production

	Average 1936-39	1947-48	Economic survey 1948	Preliminary estimate 1949-50	Program 1949-50
			(Thousand tons)		
Bread grains	1,661	1,689	2,484	2,408	2,500
Other grains	2,781	4,513	5,190	5,508	5,330
Potatoes	4,873	7,760	9,961	11,798	9,800
Sugar beet	2,741	2,959	3,600	4,319	3,600
Linseed	1	15	....	35	100
			(Per cent of prewar)		
Milk	100	109	....	119	121
Eggs	100	83	....	98	108
Beef and veal	100	83	....	85	93
Mutton and lamb	100	55	....	67	70
Pig meat	100	29	....	43	50

The livestock expansion program depends on adequate supplies of feeding stuffs. There have been no increases in ration scales since September, 1947, but rations have been provided for new entrants into pig and poultry keeping. Bonus issues are now made against deliveries of pig meat and eggs. Farmers have been allowed to keep 20 per cent of their wheat and barley crops of 1948 for feeding their stock.

The grassland improvement campaign should contribute materially to the feeding stuffs problem, but it will require more fertilizers.

It is hoped the full current demand for farm machinery can be met with the possible exception of some specialized types like crawler tractors and combine harvesters.

Fish—As regards the fishing industries, the demand for white fish still exceeds supply and efforts to raise home production will continue. The construction of new vessels has not yet made good wartime losses, but

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British landings now exceed prewar figures and imports are very much higher. Total supplies in 1949 are expected to reach over one million tons as compared with 930,000 tons in 1948. Supplies of herrings have kept pace with growing demand and are expected to do so in future. In both sections of the industry, quick freezing is being developed in order to space the distribution of glut deliveries.

Netherlands Was Main Prewar Supplier Of Dairy Products For Many Years

Supplied 60 per cent of condensed milk, 45 per cent of milk powder, 20 per cent of cheese and nine per cent of butter imports of various countries—Prewar value of exports averaged 115,000,000 guilders.

By J. A. Langley, Commercial Counsellor for Canada

(One guilder equals $0.3769 Canadian. One metric ton equals 2,204.6 pounds)

THE HAGUE, April 5, 1949.—The Netherlands has for many years been a leading exporter of dairy products, having supplied an estimated 60 per cent of the condensed milk imported by various countries, 45 per cent of the milk powder, 20 per cent of the cheese and 9 per cent of the world butter imports. The prewar value of her exports averaged around 115,000,000 guilders, which represented 25 per cent of the total agricultural shipments abroad made by the Netherlands, and more than ten per cent of her total exports.

As a result of the depletion of the cattle population during the war years and a shortage of fodder, it was not possible to resume exports of dairy products until the early part of 1946; however, a protracted drought during 1947 slowed recovery. Although still below prewar level, shipments during 1948 showed a favourable development due to suitable growing conditions and increased quantities of feedstuffs available from domestic sources as well as from abroad.

The quantitative 1948 shipments of butter represented about 42 per cent of 1939 exports, cheese nearly 44 per cent, condensed milk 34 per cent and powdered milk 43 per cent.

Netherland Exports of Dairy Products

	1939	1947	1948
		(Metric Tons)	
Butter	56,434	552	24,082
Cheese	51,952	14,687	22,728
Condensed milk	143,793	36,081	48,332
Milk powder (incl. whey powder)	15,827	1,866	6,776

From the point of value, shipments of dairy products amounted to 239·2 million guilders, with butter accounting for 100 million guilders, and condensed milk for 59·2 million guilders. In trade circles it is expected that butter and condensed milk exports will be faced with increasing difficulties, particularly the latter, since they will have to compete with that manufactured in Canada and the United States. Notwithstanding this competition it is felt that shipments abroad will show a further rise, provided increased supplies of tin plate can be obtained, and that Netherlands exports of dairy products prepared from whole milk will rapidly regain their former position in the world's markets.

Business Activity Still Declining In the Western United States

Large number of lines have tended to slacken simultaneously for first time in postwar period—Production at high level despite heavy unemployment—Industries undergoing readjustment—Construction projects adversely affected—Department store sales reduced.

By Harry A. Scott, Consul General for Canada

SAN FRANCISCO, April 22, 1949.—Since the end of the war there have been periodic warnings of an impending recession in both the Twelfth District* and the country as a whole, according to a report recently issued by the Federal Reserve Bank of San Francisco. Data for the first two months of 1949 indicate that the decline in activity which first became evident last October has continued, and that its scope has widened. This is the first time since the immediate postwar period that a large number of lines of activity have tended to slacken simultaneously. However, it required a combination of normal seasonal factors, severe winter weather in this District, and some decline in demand to keep various indicators of District economic activity moving downward.

Despite a more than 4 per cent drop in employment since the year-end and almost peak postwar unemployment in the District, as well as in the country as a whole, a near-record number of people are still employed, and industrial output is still at a high level. Prices, continuing the weakening evident late in 1948, have crept downward since the beginning of the year. Despite spectacular reductions in some retail prices to speed clearances, wholesale prices have declined only 2 per cent. Food items, declining 5 per cent, have been the leader. Price indexes for metals and metal products and building materials reached an all-time high in February and have declined only slightly in recent weeks.

Business Decline Not Gaining Momentum

There is evidence that the current decline in business activity is not gaining momentum. Lay-offs were considerably less in February than in January, and early data tend to confirm a general expectation of increased employment in the next few months. Consumer income remains at a high level. Price reductions, induced by continued consumer resistance and the virtual disappearance of shortages of goods, are tending to pave the way for continued sales and production rather than serious curtailment of output. Increasing competition is eliminating many marginal concerns. Increasing competition is also forcing the development of greater efficiency of labour and management to meet the problems which accompany price declines.

As a result, profit prospects, although less exhilarating than in recent years, are still a positive part of the business picture. Bank loans to business are down from their late 1948 peak, but their decline levelled off, at least temporarily, in March. There is no prospect of a stringency of bank reserves that would force the banks actively to restrict their credit outstanding. Taken as a whole, most factors in the current business situation do not point toward further expansion, but neither do they indicate a necessity for serious declines. However, should widespread attempts be

*The Twelfth District of the Federal Reserve Banking System comprises the Western States of Arizona, California, Idaho, Oregon, Nevada, Utah and Washington.

made to maintain prices by reducing output, and should business investment be curtailed more than now seems probable, a new appraisal of business prospects would be necessary.

District Employment Declines Sharply

Employment in the Twelfth District declined sharply during January and February, but lay-offs were on the wane early in March, and the possibilities for re-employment of substantial numbers of workers appeared good. Most of the decline in employment came during January. Total non-agricultural employment in six of the District states (data for Idaho are not available) fell 4 per cent during January, from a little over 5·2 million to 5 million persons. Manufacturing employment in the six states was off more than 50 thousand from December, but over a million people were still engaged in the production of goods. Reductions in lumber, food processing, furniture, ferrous and fabricated metals and machinery accounted for the major portion of this decline. In non-manufacturing activities, sharp declines occurred in contract construction and trade, and minor declines in railroad, public utility, service and government employment.

The number of persons out of work increased sharply during the first two months of this year. The number of insured unemployed totalled well over 550,000 in the District by the end of February. This represented a 60 per cent increase over the number of insured unemployed at the end of 1948 and at the same time last year. Most of this increase (about 150 thousand out of more than 200 thousand) came during January. The much higher level of unemployment this year than last reflects not only a somewhat lower level of activity in a number of lines but also the larger labour force this year.

During the first week in March, new claims received at various unemployment offices throughout the District were reported to be slackening. Even though additional layoffs are in prospect in a few lines, greater employment during March appeared quite likely. Construction, lumber production, railroad maintenance and retail trade all appeared to be headed for higher levels of activity as the weather improves. In addition, apparel employment which increased in February, might be expected to gain again in March. Mining operations should be at a higher level than for some months, since the extended strike at a large copper mine in Utah was settled early in February, and full-scale operations were resumed early in March.

Twelfth District Industries Experiencing Readjustment

A large number of manufacturing concerns, particularly those producing durable goods, have reported declining activity. The lumber industry felt the effect of declining demand for lower grades of lumber, which forced the closing of many marginal mills, as well as the brunt of heavy storms which forced many continuing operations to curtail production more sharply than usual. Even in the steel industry more normal demand-supply relationships have become evident. Ingot production was cut slightly by District producers, since the demand for steel ingots for conversion has virtually disappeared. Several District producers had been selling ingots, which they could not process into finished steel, in the export market or to domestic users who then had them converted at mills having the necessary finishing facilities. Not only have gray-market premiums declined, but one large District producer charging premium prices cut prices substantially on a number of items late in March. Shipyard activity has continued to decline, and there was a slight decrease in employment during the first two months

of the year. Declining activity was also reported by metal fabricators and machinery manufacturers. The furniture industry, after several years of peak production, continued to cut back its output, and employment continued the decline which started late in 1948. Production of rubber was also down, employment early this year being about 10 per cent below a year ago.

Although activity held up fairly well in non-ferrous metals, lead prices were reduced three times during March for a total decline of 4½ cents a pound. (They fell another two cents early in April to reach 15 cents a pound.) The price reductions were attributed to reduced output of automobile batteries. Zinc prices also fell in March, dropping 1½ cents. The decline in food processing during January and February appeared to be mainly seasonal. Apparel production, despite sharper competition and greater consumer selectivity, was equal to last year's levels.

Construction Adversely Affected

Many construction projects were postponed or interrupted because of severe weather conditions early this year. The decline in residential construction, however, was considerably more than could be attributed to the weather. The immediate outlook for the construction industry looks good because of the large number of projects to be completed as the weather improves. Total dollar volume of all urban building permits during January and February, however, was about 25 per cent behind last year. The number of dwellings authorized in urban areas in January was 40 per cent below last year, and February figures undoubtedly were also well below a year ago.

The weather took its toll in the railroad industry, too. Severe losses in traffic resulted from interrupted train schedules which on several occasions delayed train movements for days. As a consequence, employment was cut back in January, and it was early March before many of these employees were recalled.

Department Store Sales Drop Sharply

More conservative consumer spending, which became evident late last year, continued into 1949. In the first two weeks of this year, dollar sales in Twelfth District department stores ran ahead of 1948 but then fell behind. February sales (after allowing for seasonal differences) were about 12 per cent below January and 10 per cent below February, 1948. Sales in early March rose slightly over the February volume but were still about 9 per cent below 1948. Again the weather played a significant role. In those areas particularly affected by bad weather—the Pacific Northwest and Utah—sales declines were from two to three times the District average during January. They continued to trail the District figures during most of February but reported better results than other areas late in that month and early March.

Despite the decline in dollar sales during February and March, retailers reported that most marked-down items moved rapidly. The widespread clearance sales during early January probably account for the gain in sales during the first two weeks of the year over the same period in 1948.

In February and also in March, according to preliminary indications, sales of many consumer durable goods were below last year, with major household appliances showing the greatest decline. Reports indicated that inventories of most items subject to the regulation were growing, though furniture stores reported a slight year-period reduction in stocks during February. It was also noted that an increasing number of price concessions

were being made, either through direct price reductions or better trade-in allowances. The increased sales of furniture and radios at department stores during January were no doubt a result of the sharp mark-downs during that month.

Used-car prices have been dropping steadily, and their price relationship to new cars is more reasonable than last year. Inventories of used cars have grown considerably in the past several months.

Bank Debits Down

A smaller volume of bank debits in the first two months of this year than in the corresponding period a year ago is another indication of the falling-off in business activity. This is the first such decline in many years. In only three of the major cities in the District—Sacramento, Reno, and Salt Lake City—did debits move contrary to the general trend. In each of these three cities, total bank debits for January and February combined ranged from 5 to 25 per cent above the volume for the corresponding period a year ago as compared with a 3 per cent decline for the combined debits of the thirty-three District cities included in the bank debit series.

Bank Loans Declined Until Mid-March

The general slowing down in business activity during the first quarter of this year has been reflected in a decline in total bank loans in both the District and the country as a whole. Loans of District weekly-reporting member banks declined steadily for eleven consecutive weeks following Christmas. This was by far the longest and most pronounced decline in many years. All major categories of loans except real estate shared in the general decline, commercial, industrial, and agricultural loans accounting for the greater part of the decrease in terms of dollars. Real estate loans continued to grow at a rate slightly above that for November and December, but only about one-third as fast as in the first quarter of 1948.

The decline in District loans was at least temporarily reversed, however, in mid-March, when business as well as real estate loans registered small gains in the two weeks ending March 23.

Modernization of French Railroads Helped by ERP Funds

Washington, May 2, 1949—European Recovery Plan "double-action" dollars are helping to pay for one of the greatest reconstruction jobs in France today, the modernization of French railroads.

Blasted and crippled almost beyond recognition, the railroads of France have been salvaged from their war-time wreckage in one of the nation's most brilliant recovery achievements.

After the war, French railroads were graveyards of torn-up tracks, charred depots and twisted steel. Bombs destroyed more than 45,000 kilometres of railway lines. More than 100 stations were reduced to rubble. Eighty-five per cent of France's steam locomotives, 35 per cent of its electric engines, 64 per cent of its freight cars and almost all of its passenger cars were either blown up or taken by the Germans.

Today, the railroads have resumed their prewar operation and, in many cases, have improved their service. Once again, the French farmer can crate his produce and place it aboard a freight car with the knowledge that it will arrive on time and in good condition. Raw materials are reaching their destinations—increasing the flow of essential goods to industrial plants and factories.

Australia Introduces Legislation To Establish New Shipping Line

Debate on measure deferred until 1949 session, but legislation expected to become effective this year—Operation of line to be entrusted to the Australian Shipping Board—Federal control of sale of new motor vehicles removed—Civil aviation facilities to be improved.

By M. R. M. Dale, Assistant Commercial Secretary for Canada

(One Australian pound equals $3.2240 Canadian)

(Editor's Note—This is the fourth in a series of five articles on economic conditions in Australia in 1947-48, prepared for *Foreign Trade*.)

SYDNEY, N.S.W., March 2, 1949.—Legislation to establish a government-owned and controlled shipping line was introduced in the Federal House in December and, although the debate was adjourned until the 1949 session, it is expected that the enacting measure will become effective this year. The Minister stated that the government's main objectives are the establishment of an Australian line of steamers and the maintenance of the Australian mercantile marine and shipbuilding industry. Other points emphasized were:

1. The new Australian shipping line would be equipped with modern, suitable vessels, and would operate, at first, in the coastal and islands trade.
2. The Bill does not provide for nationalization.
3. Every effort would be made to establish the ship-building industry on a permanent basis by refusing licences to operate in the coastal trade to all but Australian-built ships less than twenty-four years old.
4. Australia would subsidize shipping companies in their purchase of Australian-built ships by reselling ships at less than the cost of construction.

Shipping Board to Operate New Line

The Australian Shipping Board would operate the new line, and the Government appears confident that, with freight at an economical level, the Board's operations would not result in financial loss. The Minister explained, however, that, at the present time, due to shipping shortages, the Board was acting as an underwriter to the private companies in the coastal trade. It was operating chartered ships which were not entirely suitable for the coastal trade and for which a high charter rate was paid. In addition, the Board was operating vessels on developmental routes to ports which were either not served, or not adequately served, by privately owned ships. The Prime Minister stated that the line would "run ships interstate, certainly to New Guinea and perhaps overseas".

The main criticisms of the proposed Bill appear to be:

1. Shipbuilding for the Australian coastal trade is to be a monopoly of Australian shipyards, and vessels are to be compulsorily replaced every twenty-four years.
2. The private companies are obliged to buy locally and from the Government, which now has a near monopoly on new construction.

3. Reference has been made to the financial failure of the first Commonwealth shipping line, inaugurated in June, 1916, which the Commonwealth Shipping Board took over in 1923. A report by the Federal Public Accounts Committee in 1927 stated: "The benefits now accruing to the country by the existence of the Commonwealth Line as a governmental concern are more than outweighed by the heavy losses already sustained and which are likely to continue. The expectations of Parliament, when it passed the Shipping Act in 1923, have been far from realized, and the results of the trading of the line prove how unreliable forecasts and estimates are in the shipping business."

4. The risk of excessive cost to the national economy is foreseen, and it is pointed out that it would be no remedy to shift part of the burden resulting from higher shipping charges from the shipper to the taxpayer. This criticism foresees the danger of shipowners being unable to secure requirements at a reasonable cost and within a reasonable time and yet being prohibited from buying elsewhere.

At present the government owns 44 vessels grossing 211,530 tons, most of the ships being of two classes, either 9,900 tons or 2,500 tons.

Shipping Rates Increased

More than 120 ships engaged in interstate trade were affected by the decision of the Australian Ship Owners' Federation to increase interstate shipping rates by 10s. a ton for general cargo as from November, following the decontrol of shipping rates. Passenger fares were similarly increased by 10 per cent.

Increased costs are attributed to lower waterside labour output, which is estimated to have fallen by 40 per cent since before the war. Other factors causing the increase and the higher ship-building costs are higher operational costs and fuel costs and the doubling of repair and docking costs.

That the turn-around of ships in Australian ports is now slower than in the prewar period and that watersiders are handling less cargo was shown by the first annual report of the Stevedoring Industry Commission. The report also shows, however, that the loss of working time from stoppages by waterside workers in 1947-48 fell by more than 1,000,000 man-hours.

Price Control Lifted for Second-hand Cars

Auction sales of used cars, following decontrol, were watched with interest. Cars in good mechanical condition generally sold about 26 per cent above the old pegged price but 17 per cent below the black-market price in effect just before controls were removed.

Federal control of the sale of new motor vehicles has now been removed. Controls were relaxed on small British cars some months ago, but it was the government's intention to retain control of larger-horsepower cars under the Defence (Transitional Provisions) Act. This Act, in so far as it relates to new motor cars, was challenged in the courts and the High Court found against the Government. The Prime Minister, in defending the retention of controls on American-type cars, stated that these were in greater demand by essential users, and the Federal control operated to protect their interests. Since the abolition of control, automobile distributors have undertaken to have regard for the demands of essential users.

Car registrations in 1948 were 68,480 as compared with 32,337 in 1947. In the second half of 1948 an average of 6,000 new cars a month were registered. As of December, 1948, there were 1,107,908 cars registered in Australia, of which 414,175 were commercial vehicles. Of new cars registered, upwards of 75 per cent were of British make. It is noteworthy that, while in 1938 23,608 British cars were imported at a value of £2,187,339, during the first six months of 1948 a total of 26,452 was imported, their value being £7,066,484.

Petrol Ration Reduced

The petrol ration, which was reduced by 20 per cent in October, is intended to permit a private motorist to cover 1,895 miles per year. Eight-horsepower cars are allotted 4½ gallons per month and cars of more than 30 horsepower are allowed 10 gallons. The allotment for commercial vehicles was cut by 10 per cent.

The necessity for reducing the ration is based on the increased consumption of liquid fuel in Australia. Consumption rose from 360 million gallons in 1939 to 395 million gallons in 1947. The increased number of registered cars also brought about an upward trend in the consumption of fuel. Comparison with other countries shows that, on the average, car and truck drivers in Australia will receive 350 gallons per year as compared with 664 gallons in India and 612 gallons in South Africa.

The petrol tax, amounting to 11d. per gallon, has been strongly criticized by the National Roads and Motorists' Association. This organization objected to the impost being classified as a "luxury tax". It was equally critical of the tax being paid into the consolidated fund rather than being used for road building and maintenance. Revenue from the tax last year amounted to £16,009,515, of which £4,738,098 was expended for road improvement.

Eighty per cent of Australia's petrol now comes from sterling areas. Nevertheless, because the remainder of Australia's petrol, and about 40 per cent of Britain's, has to be paid for in dollars, the Government has emphasized that every gallon of petrol saved represents a dollar saving.

The Australian Transport Road Safety Committee has allocated £100,000 for road safety publicity in the current financial year. This amount is to be shared equally by the six states of the Commonwealth.

Civil Aviation Facilities to be Improved

In September the federal cabinet approved a £5,179,000 program to improve civil aviation facilities throughout Australia. The main items include:

1. £657,000 to buy distance-measuring beacons for 89 radar stations. These beacons will assist the air traffic control service to make better use of the air space by defining precisely where obstacles do and do not occur.
2. £455,000 for instrument-landing systems at 13 locations chosen to assist planes arriving from long ocean flights to land under port conditions and low-ceiling visibility.
3. £264,000 to buy 180 radio transmitters to extend the internal point-to-point network duplicate homing beacon transmitters at important centres and to replace unsuitable low-power equipment elsewhere.
4. £230,000 to complete 30 radio range stations now being installed and to build nine others.

Modernization of the Australian airways system would include also extension of the international point-to-point communication network.

It is expected that the production of the second type of jet warplane in Australia will begin in 1949.

Government Purchased New Planes

The Commonwealth Government purchased four DC 6's from Sweden, payment to be made in sterling. By this purchase, first-class American planes were added to the Australian airlines, and at the same time dollar reserves to the amount of some $3,240,000 were conserved. The DC 6's have been turned over to the British Commonwealth Pacific Airlines for use on their Sydney-Vancouver service.

The Australian-United Kingdom run is now being flown by Constellations exclusively. The three-engined de Haviland transport and cargo plane, designed and built in Australia, may be used by Trans-Australia Airlines on domestic feeder operations. A second service by Tasman Empire Airways, from the South Island of New Zealand to Hobart, Tasmania, has also been proposed.

The first air mail parcels arrived in Sydney from the United States by a Pan American Airways clipper last September. At present the service operates only from the United States to Australia, but the Postmaster General's Department is considering an outward parcels service.

Qantas Empire Airways have surveyed a new air route across the Indian Ocean, which will link Australia with South Africa. This survey followed the announcement by the Minister for Air that an alternative all-British air route between Australia and England, across the Indian Ocean, was being prepared for use in case of emergency. The route surveyed was via Perth, Cocos Island, Mauritius to Durban, a total of 9,000 miles. It is proposed to use Lancastrians on the service initially.

Unification of Railway Gauges under Consideration

Plans for a unification of railway gauges in Australia are still being reviewed. At the same time, however, Queensland is considering extensive construction of new narrow-gauge lines.

For the last financial year the New South Wales Railways showed a surplus of £111,585, after increased rates were effected; however, a deficit of £1,392,000 has been budgeted for in 1948-49. Estimated expenditure, other than capital debt charges, is £33,012,000, or £2,485,673, higher than last year, 60 per cent of the increase being accounted for by variations of awards and wage increases and increased cost of stores and material. Forty per cent of the increase is to meet heavy expenditure for maintenance and the renewal of rolling stock and trucks.

The state governments have materially raised both freight rates and passenger fares, the increases ranging from 15 to 40 per cent.

In New South Wales, trams and buses last year showed a loss of £64,500 despite £670,000 revenue from increased fares, a direct government subsidy of £331,150 and £294,350 relief from some capital debt charges.

Broadcasting Control Board Established

The establishment of an Australian Broadcasting Control Board was announced in September. The Board would take action to ensure that:

1. Programs were of reasonable length and variety.
2. Adequate and appropriate times were set apart for religious broadcasts.

3. Equitable facilities were provided for political and controversial matter.
4. The advertising content of programs was not excessive.
5. Select sites for new A.B.C. regional stations.
6. Arrange for equitable sharing of the 107 existing frequency channels.
7. Prevent unnecessary duplication of news and feature sessions.
8. Supervise programs of all stations by conferring with managements.
9. Grant and withdraw broadcasting licences, subject to the Minister having the final decision.
10. Control the development of frequency modulation.

The Australian Government has decided to introduce, as early as practicable, frequency modulation in all capital cities and in country districts where technically possible. There was considerable criticism of what was termed a government monopoly of frequency modulation when the government announced that "this is essentially an Australian Broadcasting Commission show; it is not for commercial stations".

The Commonwealth Government has estimated that it would spend £500,000 on the construction of twenty new national radio stations, costing £75,000 a year to operate. Tenders for the construction of three buildings, one aerial and ten transmitters have already been accepted.

In December, 1948, the number of licensed listeners in Australia totalled 1,899,495, an increase of 67,075 over the previous year's figure.

Telephones in Short Supply

The Postmaster General's Department last year installed more than twice as many telephones throughout Australia as in 1939, but there are still 120,000 outstanding applications. Installations for 1948 totalled 41,500 as compared with 39,451 in 1947 and 20,293 in 1939.

It has been estimated that all metropolitan telephones will be automatic in about five years, and more than 1,000,000 subscribers will be served by fewer than 100 exchanges. The Department expects to spend £42,000,000 during the next three years, and the automatic telephone trend will extend throughout Australia.

On December 9 a radio-telephone service between Australia and the French zone of Germany was established.

New Zealand Purchases Australian Wheat

Wellington, March 15.—(FTS)—New Zealand is purchasing 2,500,000 bushels of Australian wheat at 15 shillings (Australian) per bushel f.o.b. Australian ports (about $2.42 Canadian), to be delivered between June and December, 1949. Delivery in the latter part of 1949 was specified, due to the fact that New Zealand would be getting wheat during the first half of the year under the present agreement, which would expire in June. The price in the existing agreement is 5s. 9d. per bushel. The average cost of wheat required from Australia this year works out at 8s. 3d. (N.Z.) per bushel f.o.b. Australian ports.

By July or August of this year, New Zealand will have bought the limit of 18 million bushels of wheat under the current contract with Australia at 5s. 9d. per bushel. The present contract is for four years and has another year to run, but there is a quantitative limit of 18 million bushels, which will be reached by July or August. In the three years, New Zealand will have imported about as much wheat as she has produced.

Canada Led As Supplier of Linseed Oil to South Africa Last Year

Of the Union's total purchases, 95 per cent, or 902,990 gallons, was supplied by Canada—Foreign exchange control has not restricted purchases of raw materials by the parent industry —Allocations with effect from July 1, 1949, expected to be favourable.

By D. S. Armstrong, Assistant Commercial Secretary for Canada

JOHANNESBURG, March 25, 1949.—Thirty manufacturers of paint and allied lines in South Africa produce an estimated two and one-half million gallons of these products annually. In 1948, Canada supplied 902,990 gallons, or about 95 per cent of the linseed oil requirements of this industry and, providing prices are competitive, even in the face of exchange control. Canadian producers and exporters should continue to obtain their share of this trade, which was valued at over two million dollars last year.

The prewar average quantity of linseed oil imported into the Union annually was 875,000 gallons; as none is produced locally this can be considered as total consumption. The chief sources of supply were the Netherlands (between 55 and 60 per cent of the total imports), India (approximately 16 per cent), Argentina and Uruguay (13 per cent), and the United Kingdom (9 per cent). Before the war, Canada did not participate in this trade, and Latin American sources were just beginning what eventually developed into a profitable but short-lived business. Many South African buyers still consider the quality of Dutch linseed oil to be the best, and they would prefer to import from that country if supplies were available. Apparently the Netherlands is now Canada's leading market, followed closely in 1948 by the United Kingdom and South Africa.

In the later war years and up to 1948, South Africa was able to obtain only half of its normal requirements. Most of this trade went to India, Uruguay and Argentina. Canadian linseed oil was not released from control by the Oils and Fats Committee of the International Emergency Food Council in Washington until May 26, 1948, and prior to this date only small allocations were made to Canada as a supplier to South Africa. Because of the embargo on trade with the Union, imposed by the Indian Government for political reasons, and also because of high prices and the unreliable quality of the South American product, the Union's industry welcomed the addition of Canada as a source of supply. On the whole, there have been relatively few complaints concerning the quality of Canadian linseed oil, and Canada's reputation as a reliable country with which to trade has thereby been enhanced.

Foreign Exchange Control Favours Raw Materials

At this date the Union's foreign exchange control, instituted in November, 1948, has had no restrictive effect on purchases of raw materials by the paint manufacturing industry. Under this control, the industry's members were given a basic quota of non-sterling foreign exchange amounting to 50 per cent of the f.o.b. value of purchases made in 1947. This was to be used for purchases on a c.i.f. basis for the year July 1, 1948, to June 30, 1949. In addition, the authorities allowed individual firms supple-

mentary allocations of foreign exchange for purchases of essential raw materials not available from sterling or local sources. The effect on the paint industry was that exchange was granted for all normal purchases of linseed oil, the basis for determining what are "normal" being details of past purchases submitted to the Controller of Fats and Oils by individual firms.

The whole foreign exchange position of the Union is now under review by the authorities with a view to setting up a definite basis for granting allocations, with effect from July 1, 1949. The form that the new controls will take is not known, but it will probably be some type of commodity control, using 1948 figures as a basis for computing foreign exchange requirements. Unless the overall exchange position is proven to be much worse than it appears to be at present, it is not unreasonable to expect that the paint industry will be accorded favourable consideration.

Competition Expected from Two Sources

Apart from South African foreign exchange controls in existence now and future revisions, there are two potential threats to the future trade in Canadian linseed oil. The first is Latin American competition. The history of trade between South American countries and the Union has been spotty and opportunist. However, through years of expensive experience, South African buyers now know the reliable sources of supply in this area. Obviously price will count for more than sentiment if linseed oil is released for export by South American countries, and therefore, although prices are not presently competitive, Canadian exporters can expect competition from these sources.

The Marine Oil Refiners of Africa Limited, in Cape Town, have developed a "highly refined bleached and winterized sardine oil", which can be mixed with linseed oil up to the proportion of 50 per cent. This firm contends that the mixture is an adequate substitute for pure linseed oil. Some members of the industry are testing this sardine oil in various proportions with linseed oil, but no definite conclusions have been reached. Under foreign exchange controls, the effect of a local source of supply is obvious, even though there may be a price differential.

More Direct Merchandising Methods Favoured

Some South African buyers are rather critical of merchandising methods used by a few Canadian firms. There are about six linseed-oil expressors in Canada, and at least a dozen different sales agents in the Union. Purchasing agents for the paint firms do not like to deal with two or three different agents all selling oil from one firm. Many of them also feel that they are paying a higher price if they deal with a "factor" house in Canada as opposed to the normal selling channel from mill through the local agent to the buyer direct. South African importers are not averse to paying the agent's commission, which ranges from ½ to 1½ per cent, for cable and selling expenses, which the agent must incur.

One trade custom of some importance is the desire of the South African buyers to receive quotations on a weight basis rather than on volume. There appears to be a difference of opinion as to the actual weight of a gallon of linseed oil, and therefore the gallon measurement is not favoured.

If Canadian producers are to maintain the good name which they have established in South Africa in the short space of one year, their prices will have to be in line with those of other countries of supply, and they should adopt direct merchandising methods.

Italian Merchant Marine to be Assisted by Counterpart Funds and Government Aid

Some 15,000 million lire authorized by Economic Co-operation Administration in form of loans and grants—Italian legislation provides for subsidies and exemptions that should encourage the construction, repair or modification of new or existing tonnage.

By A. P. Bissonnet, Assistant Commercial Secretary for Canada

(Editor's Note—One lira equals $0.0017 Canadian)

ROME, April 29, 1949.—Assistance will be provided for the Italian merchant marine during the current year in the form of loans and grants from the counterpart fund of lire, some 15,000 million lire having been authorized by the Economic Co-operation Administration for this purpose. Legislation, introduced last March, provides for subsidies and exemptions that should encourage shipbuilders and shipowners to construct, repair and modify new or existing tonnage. It is estimated that revenue from operations of the Italian merchant marine will amount to $150,000,000 this year.

The law is to be in force for a period of three years and stipulates that not less than 30 per cent of all tonnage constructed under benefit of the law is to be done in the yards of South Italy. The government will provide direct subsidies and contribution towards amortization up to one-third of the cost of ships built or modified during this period, one-sixth of which is payable when construction commences. However, in the case of fishing boats, the limit is set at one-half of the total cost.

Free importation of certain essential raw materials and parts is permitted, and merchant ships are made exempt from payment of the general tax on income in the case of the first sale of a ship by a national shipyard.

Merchant Ships Exempt from Requisition for Five Years

The law exempts merchant ships from requisition for five years, except in the case of a national emergency. Provision is made for the construction of ships benefiting by the legislation to embody certain features in design which meets with the approval of the Ministry of Defence. Special provision is made to aid owners who have lost ships with a maximum tonnage of not more than 150 gross tons, due to war, and who have no other means of livelihood.

Law Also Applies to Trieste

Benefits under the law are also available in the Free Territory of Trieste.

Italian merchant marine tonnage was made up as follows at the end of 1948: Available at end of war, 420,000 tons; salvaged or repaired, 254,515 tons; redeemed or returned, more than 106,766 tons; surplus shipping purchased from USMC, 803,405 tons; purchased abroad from shipping companies, 294,970 tons; built up to December 31, 1948, 183,381 tons.

During 1948, 47 vessels of over 100 gross tons were launched in Italy, amounting to 111,555 tons, but of those only 19, amounting to 25,193 gross tons, were registered in Italy.

Canadian Trade Commissioner Service to Have Office in the Philippine Islands

Trade with that country has increased from $1,800,000 in 1938 to $16,252,000 in 1948—F. H. Palmer, of Halifax, will open forty-sixth office in Manila.

TRADE between Canada and the Philippines should be stimulated with the establishment at Manila next autumn of a new office of the Canadian Trade Commissioner Service. It will be the forty-sixth, others being established in thirty-eight different countries.

F. H. Palmer

Frederick Herbert Palmer, presently Commercial Counsellor for Canada in Stockholm, has been assigned to open the new office at Manila, which has been under the jurisdiction of the office in Hong Kong. Born in Belfast, Ireland, in 1892, Mr. Palmer came to Canada at an early age, and received his education in Halifax. He attended Dalhousie University, and received a Bachelor of Science degree from the Nova Scotia Technical College in 1913. Mr. Palmer served overseas during the First World War, and was decorated with the Military Cross. He joined the Canadian Trade Commissioner Service in 1921, and was posted in succession to New York, Rotterdam, Milan, Oslo, Bristol, Melbourne and Chungking. A keen sportsman, Mr. Palmer helped to introduce the game of ice hockey to Norway, and at one time was amateur golf champion of that country.

Canada's trade with the Philippines has increased from $1,800,000 in 1938 to $16,252,000 last year, of which $9,810,000 consisted of exports and $6,442,000 of imports. Among the principal products sold by Canada last year to the Philippines were flour, sewing machines, fertilizers, canned sea herrings, canned salmon and newsprint. Copra and desiccated coconut, manila fibre and mahogany are the principal items purchased by Canada from those islands. Canada has been the Philippines' second most important source of supply since the end of the war.

Canadian Transit Shed in Genoa Well Equipped

Genoa, April 27, 1949.—(FTS)—The new transit shed in this port, designed and recently completed by the Montreal Shipping Company, Limited, serves as a warehouse for the temporary storage of cargo and assists in expediting the discharge and loading of its vessels. The two floors, 90 feet by 435 feet, provide approximately 50,000 cubic feet of storage space that will accommodate 6,000 tons of merchandise. The shed is equipped with ten tow-motors, which can handle from 1½ to two-ton drafts on pallets at the rate of 20 tons an hour.

Trade Fairs in Strasbourg and Marseilles Planned

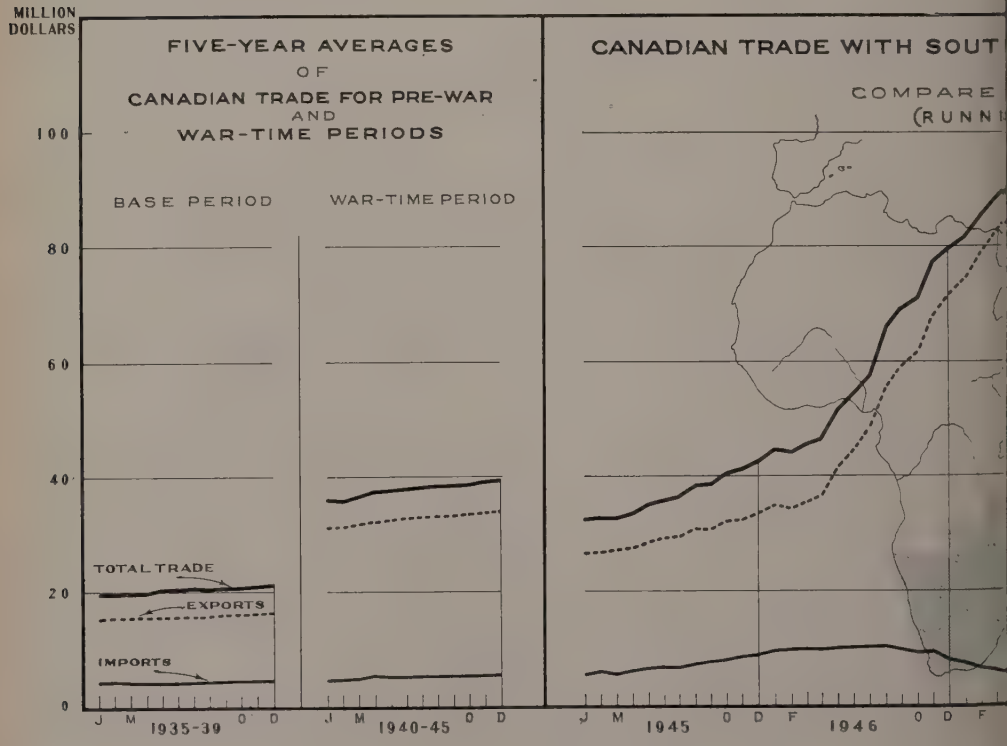
Paris, May 15, 1949.—Two international fairs are scheduled for this autumn, one in Strasbourg from September 3 to 19, and the other in Marseilles from September 10 to 26. Anyone interested in obtaining further information about these affairs should communicate with the director of the international trade fair at 9, rue Brulee, Strasbourg, or the director of the international trade fair at 36, la Canebiere, Marseilles, France.

Canadian Trade with South Afr

Canadian Imports

Country	Twelve Months Ended February					
	Average 1935-39		1948		1949	
	Value $'000	Per cent	Value $'000	Per cent	Value $'000	Per cent
Union of South Africa	.....	.....	4,182	95·2	3,899	88·6
Other British South Africa	.....	.....	1	‡	1	‡
Northern Rhodesia	.....	.....	28	0·6	29	0·7
Southern Rhodesia	.....	.....	185	4·2	475	10·8
TOTAL	4,300[3]	100·0	4,395	100·0	4,403	100·0

For statistical purposes the Union of South Africa includes Basutoland, Bech



Northern and Southern Rhodesia

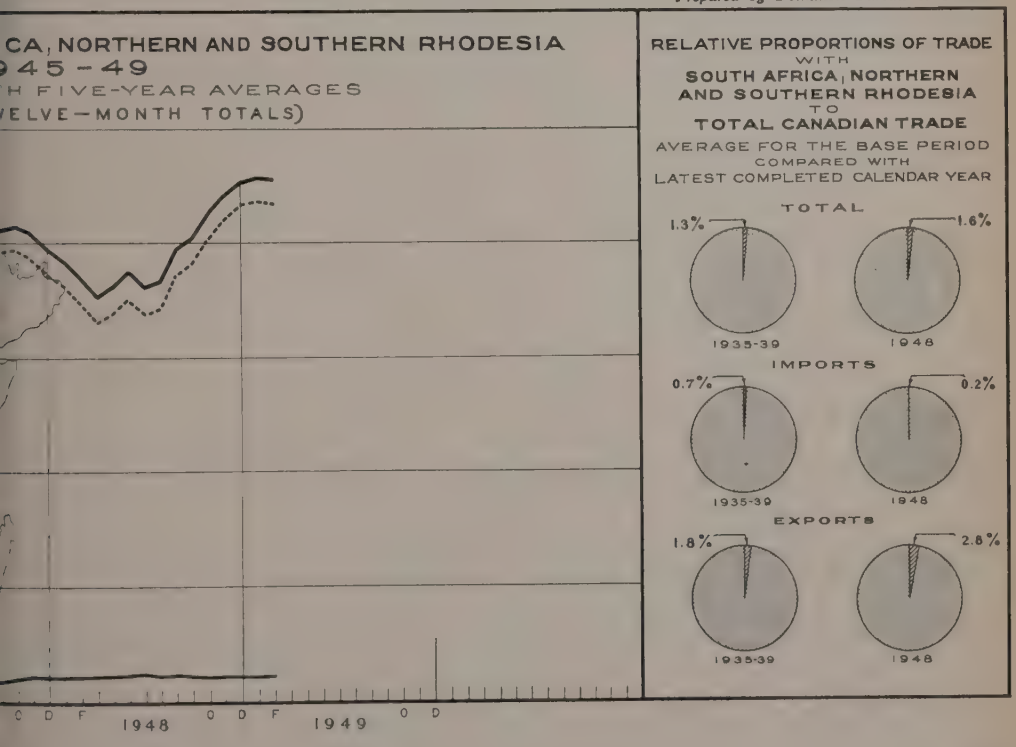
Canadian Exports

Country	Twelve Months Ended February					
	Average 1935-39		1948		1949	
	Value $'000	Per cent	Value $'000	Per cent	Value $'000	Per cent
Union of South Africa	.....	.....	62,123	89·5	83,024	95·8
Other British South Africa	.....	.....	15	[2]	6	[2]
Northern Rhodesia	.....	.....	375	0·5	643	0·7
Southern Rhodesia	.....	.....	6,891	9·9	2,991	3·5
TOTAL	15,389[3]	100·0	69,404	100·0	86,664	100·0

[1] Less than $1,000. [2] Less than one-tenth of one per cent. [3] Not available by countries.

d and Swaziland in the above-mentioned tables and the trade chart below.

Prepared by Dominion Bureau of Statistics



Monthly Summary of Foreign Trade

Canadian Exports (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	62·8	70·3	242·0	230·5	189·1	208·6	235·4	237·0
February	57·4	59·6	227·2	236·4	153·1	179·5	208·3	205·0
March	71·1	73·3	282·7	301·2	178·4	209·0	228·4	216·8
April	48·5	50·9	282·9	312·3	178·5	190·9	212·3	.....
May	75·6	67·0	368·4	315·2	197·0	267·8	282·3	.....
June	73·3	66·0	343·2	322·8	166·7	272·7	233·5	.....
July	74·4	66·2	278·7	282·7	188·7	236·6	250·9	.....
August	77·1	69·1	257·0	295·0	242·7	221·3	224·1	.....
September	76·8	72·2	264·6	220·8	169·8	218·6	283·0	.....
October	91·3	88·2	314·0	227·9	204·2	250·8	307·0	.....
November	95·0	86·0	312·5	238·6	232·2	253·1	293·9	.....
December	81·3	68·9	266·9	234·8	211·9	266·2	316·4	.....
Total	884·5	837·6	3,440·0	3,218·3	2,312·2	2,774·9	3,075·4	658·8

Canadian Imports (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	44·6	49·7	126·4	129·7	140·3	173·8	206·1	223·8
February	42·9	47·0	138·4	112·4	117·0	177·1	182·2	206·0
March	59·1	65·1	150·8	132·5	139·9	208·9	197·1	235·9
April	45·3	48·9	137·5	133·8	160·8	225·6	226·7	.....
May	66·1	67·1	159·0	143·8	164·2	240·3	225·1	.....
June	60·5	58·9	152·5	146·5	157·7	231·1	233·0	.....
July	57·6	55·8	148·5	138·7	161·6	226·8	225·1	.....
August	57·9	57·0	157·3	128·1	163·2	204·6	206·5	.....
September	59·6	56·4	159·7	122·3	156·1	208·1	221·7	.....
October	68·6	63·9	160·1	134·4	186·4	254·5	243·4	.....
November	70·1	63·3	141·6	142·4	198·2	229·1	238·2	.....
December	52·2	44·3	127·2	121·2	181·9	194·2	232·0	.....
Total	684·6	677·5	1,758·9	1,585·8	1,927.3	2,573·9	2,636·9	665·7

Balance of Trade with all Countries (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	+ 19·0	+ 21·8	+ 119·6	+ 104·2	+ 51·0	+ 36·7	+ 33·0	+ 15·2
February	+ 15·3	+ 13·5	+ 90·9	+ 128·0	+ 37·7	+ 4·7	+ 28·1	+ 1·2
March	+ 13·0	+ 9·2	+ 139·2	+ 174·5	+ 40·0	+ 3·0	+ 33·9	— 16·9
April	+ 4·0	+ 2·6	+ 149·2	+ 184·3	+ 19·5	— 32·2	— 11·6	.....
May	+ 10·6	+ 0·8	+ 211·8	+ 174·9	+ 34·6	+ 30·9	+ 62·4	.....
June	+ 13·8	+ 7·9	+ 193·5	+ 180·7	+ 11·1	+ 45·3	+ 3·0	.....
July	+ 17·9	+ 11·4	+ 133·3	+ 147·4	+ 29·6	+ 12·8	+ 28·4	.....
August	+ 20·3	+ 12·9	+ 101·9	+ 172·5	+ 82·8	+ 20·3	+ 20·0	.....
September	+ 18·3	+ 16·7	+ 107·6	+ 102·7	+ 15·8	+ 13·4	+ 64·4	.....
October	+ 23·8	+ 25·3	+ 158·4	+ 98·5	+ 20·2	— 0·8	+ 66·0	.....
November	+ 26·2	+ 23·5	+ 175·9	+ 98·8	+ 37·0	+ 26·9	+ 58·2	.....
December	+ 30·3	+ 25·6	+ 142·9	+ 115·2	+ 32·4	+ 76·7	+ 87·3	.....
Total	+ 212·5	+ 171·2	+1,724·2	+1·681·6	+ 411·9	+ 237·8	+ 473·1	— 0·6

Note.—Throughout this bulletin, totals represent unrounded figures, hence may vary slightly from rounded amounts. The value of "Foreign Exports" is not included under the tabular heading "Canadian Exports", for which reason figures showing the balance of trade do not represent the difference between those for export and imports.

Canadian Exports to the United Kingdom (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	25·5	33·6	94·8	83·2	51·1	50·5	64·9	55·8
February	23·6	27·3	78·2	67·5	37·9	44·9	51·7	44·1
March	26·4	27·8	110·4	108·8	50·5	47·6	59·2	39·5
April	16·4	18·8	101·2	109·1	41·0	43·1	44·4	.....
May	30·5	27·9	140·2	115·6	54·9	90·5	85·1	.....
June	28·9	25·6	127·9	94·6	30·6	76·2	54·2	.....
July	30·5	25·8	104·9	83·9	40·4	69·4	56·3	.....
August	31·3	26·7	90·2	66·6	71·9	66·0	52·5	.....
September	30·8	28·9	94·4	58·8	54·3	54·5	47·9	.....
October	38·4	36·0	112·6	56·3	47·7	66·8	65·6	.....
November	41·4	35·8	102·2	52·4	57·9	69·3	56·7	.....
December	30·0	25·5	77·9	66·4	59·4	72·5	48·5	.....
Total	353·6	339·7	1,235·0	963·2	597·5	751·2	686·9	139·4

Canadian Imports from the United Kingdom (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	8·0	8·9	7·1	9·4	20·1	14·3	21·6	25·4
February	8·1	8·8	6·7	6·7	13·0	10·5	17·9	22·9
March	10·9	11·5	9·8	9·3	14·4	13·8	21·6	28·3
April	8·4	9·2	8·4	12·0	21·2	12·7	24·6	.....
May	12·7	11·9	13·0	15·2	18·8	15·2	27·4	.....
June	10·8	9·2	9·4	13·8	23·4	18·1	26·0	.....
July	11·3	9·7	5·9	12·0	21·9	17·7	29·4	.....
August	11·4	10·4	4·6	10·7	14·5	15·1	24·7	.....
September	10·5	10·0	7·1	9·6	12·0	15·6	24·1	.....
October	11·0	11·6	18·1	12·1	15·6	18·3	29·3	.....
November	13·0	11·0	11·1	14·8	14·9	17·8	28·3	.....
December	8·0	7·0	9·4	14·9	11·7	20·3	24·6	.....
Total	124·0	119·3	110·6	140·5	201·4	189·4	299·5	76·7

Balance of Trade with the United Kingdom (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	+ 17·7	+ 24·8	+ 88·2	+ 74·5	+ 31·2	+ 36·3	+ 4[illegible]·4	+ 30·5
February	+ 14·6	+ 18·7	+ 72·0	+ 61·4	+ 24·9	+ 34·5	+ 33·9	+ 21·4
March	+ 15·6	+ 16·4	+ 100·7	+ 101·5	+ 36·2	+ 33·9	+ 37·7	+ 11·3
April	+ 9·1	+ 9·6	+ 93·0	+ 98·9	+ 19·8	+ 30·4	+ 19·8	.....
May	+ 17·7	+ 16·2	+ 127·3	+ 101·1	+ 36·2	+ 75·6	+ 57·8	.....
June	+ 18·3	+ 16·6	+ 118·6	+ 81·3	+ 7·3	+ 58·2	+ 28·3	.....
July	+ 19·4	+ 16·3	+ 99·3	+ 72·2	+ 18·6	+ 52·0	+ 27·1	.....
August	+ 20·0	+ 16·5	+ 85·7	+ 56·8	+ 57·5	+ 51·1	+ 27·9	.....
September	+ 20·3	+ 19·0	+ 87·7	+ 49·2	+ 42·4	+ 39·4	+ 24·1	.....
October	+ 27·5	+ 24·6	+ 94·9	+ 44·8	+ 32·1	+ 48·7	+ 36·5	.....
November	+ 28·4	+ 24·8	+ 91·3	+ 37·7	+ 43·3	+ 51·6	+ 28·6	.....
December	+ 22·1	+ 18·6	+ 68·7	+ 51·6	+ 47·8	+ 52·5	+ 24·0	.....
Total	+ 230·8	+ 222·1	+ 1,127·5	+ 830·9	+ 397·4	+ 564·3	+ 389·2	+ 63·2

Canadian Exports to the United States (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	22·1	20·0	85·3	84·7	62·3	79·5	105·0	116·0
February	19·7	16·8	91·6	91·5	57·6	69·4	94·8	106·7
March	25·9	22·7	97·4	103·3	66·5	83·1	112·5	122·4
April	20·1	18·0	120·3	109·1	71·4	88·3	109·2	.....
May	26·1	20·4	131·9	117·2	72·2	79·8	114·7	.....
June	25·1	20·0	111·2	112·3	66·5	82·0	109·8	.....
July	25·9	21·0	98·8	102·7	74·8	82·1	118·9	.....
August	28·3	25·3	86·0	112·6	75·0	81·4	114·0	.....
September	29·4	25·1	110·5	84·8	69·6	87·5	162·0	.....
October	33·5	28·0	123·0	88·4	99·1	102·4	148·9	.....
November	31·9	28·4	118·9	101·2	89·2	92·9	163·3	.....
December	33·3	24·7	126·4	88·9	83·9	106·0	147·8	.....
Total	321·3	270·5	1,301·3	1,197·0	887·9	1,034·2	1,501·0	345·2

Canadian Imports from the United States (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	28·7	32·3	106·3	101·8	97·4	136·4	150·0	164·8
February	27·9	31·2	115·8	92·8	86·0	138·4	136·8	148·8
March	38·0	42·9	123·3	105·3	100·1	165·1	138·3	169·0
April	29·2	31·4	114·4	102·7	114·8	181·6	159·5	.....
May	38·3	40·5	127·0	104·8	113·4	184·7	145·0	.....
June	36·4	37·1	122·2	110·7	106·6	174·7	154·9	.....
July	33·4	34·1	124·0	103·5	112·5	168·9	149·5	.....
August	33·7	35·3	138·3	96·8	123·1	155·3	136·1	.....
September	36·2	34·7	135·6	89·6	115·8	163·0	152·7	.....
October	42·5	38·5	121·4	101·3	140·4	190·4	160·2	.....
November	40·8	37·6	116·1	103·3	149·5	174·4	163·4	.....
December	33·6	29·2	102·9	89·9	145·6	141·7	159·4	.....
Total	418·7	424·7	1,447·2	1,202·4	1,405·3	1,974·7	1,805·8	482·6

Balance of Trade with the United States (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	− 5·9	− 11·3	− 18·3	− 15·0	− 33·2	− 55·8	− 43·2	− 47·3
February	− 7·5	− 13·8	− 22·7	+ 1·9	− 27·1	− 67·1	− 40·4	− 40·6
March	− 10·3	− 19·5	− 19·4	+ 1·7	− 32·4	− 80·2	− 24·2	− 44·9
April	− 8·4	− 12·8	+ 9·0	+ 10·1	− 41·9	− 91·6	− 48·0	.....
May	− 11·0	− 19·5	+ 6·8	+ 15·0	− 39·9	− 102·7	− 28·7	.....
June	− 10·5	− 16·5	− 9·0	+ 3·8	− 38·5	− 90·5	− 43·5	.....
July	− 6·6	− 12·4	− 23·3	+ 1·5	− 35·9	− 84·9	− 28·6	.....
August	− 4·5	− 9·4	− 50·4	+ 18·2	− 45·6	− 71·6	− 20·3	.....
September	− 5·9	− 8·9	− 23·0	− 2·3	− 44·7	− 73·8	+ 11·4	.....
October	− 8·0	− 9·7	+ 5·2	− 9·9	− 39·4	− 86·2	− 9·6	.....
November	− 7·7	− 8·6	+ 6·4	− 0·1	− 58·1	− 79·8	+ 1·5	.....
December	− 0·7	− 3·7	+ 25·9	+ 0·1	− 60·1	− 33·9	− 9·9	.....
Total	− 87·0	− 146·0	− 112·7	+ 25·0	− 496·7	− 918·1	− 283·6	− 132·8

Industrial Output in Bizonal Germany Sets Postwar Record During March

Production rose to 89 per cent of the 1936 level—Electrical equipment industry has made greatest rise with output reaching 184 per cent of prewar level—Gains registered by many other branches.

By B. J. Bachand, Canadian Economic Representative

FRANKFURT, April 25, 1949.—Bizonal industrial production rose to 89 per cent of the 1936 level, and established a new postwar record for the eighth month since currency reform. March's 89 per cent represents a rise of nine index points over February's output, which was 80 per cent of the 1936 level. Postwar records were established in 15 of the 17 Bizonal industries for which figures are available. Output of paper and paper products and stones and earths led during March with rises of 19 per cent over the previous month. Vehicle production continued its strong upward trend with an 18 per cent increase over February. Only three groups rose less than 9 per cent. They were machinery and optical goods; electrical equipment, which is already far above the 1936 level; and leather and leather products.

The electrical equipment industry has risen the most of the industrial groups during postwar years and during March reached 184 per cent of the 1936 level. This unusually high figure reflects the geographical shift in the industry since 1936, when the major plants were largely concentrated in Berlin.

Four Industries Continue to Rise Above Prewar Output

Four other industrial groups continued to rise above the 1936 level. The first, electricity and gas production, at 145 per cent, was slightly below the postwar record of 147 per cent in January, as demand decreased seasonally with longer daylight and warmer weather. The principal factors involved in the rise of electricity and gas output are the 25 per cent rise in population since 1936, which greatly expanded household demands, and the progress in electrification of industry over the past twelve years.

The second group, mining, other than coal, now standards at 128 per cent of the 1936 level. Included in this group is the production of crude potash, iron ore, iron pyrites and non-ferrous metal ores, all of which are above the 1936 level. The potash deposits in the Bizone are being more extensively exploited in postwar years because the large deposits in the Soviet zone are no longer accessible.

Glass and ceramics and rubber products are the other two groups standing above the 1936 production level. The glass and ceramics industry suffered relatively little war damage and decorative porcelain has been fostered for export. The level of this industry during March was 118 per cent. Technical ceramics are being developed to replace the former Soviet zone sources. Meanwhile, rubber products reached the 115 per cent mark during the past month. The rubber industry is well supplied with raw materials and has an adequate manufacturing capacity, much of which was constructed after 1936.

DIRECTORY INFORMATION

The Foreign Trade Service head office directory, as well as the directory of Foreign Commercial Representatives in Canada, appears only in the last issue of each month.

Parcels Received by United Kingdom Last Year From Canada Showed Increase

British imports, arriving by post, valued at equivalent of $64,766,000, of which receipts from Canada accounted for $11,000,000—Estimated that large proportion of parcels comprised gift packages of foodstuffs—Purchases of silk and artificial silk yarns and apparel from Canada increased.

By A. E. Bryan, Commercial Counsellor for Canada

(Editor's Note—This is the sixth in a series of articles on the overseas trade of Great Britain, prepared for *Foreign Trade*.)

LONDON, March 10, 1949.—Parcels received in Great Britain last year had a value of $64,766,000, of which $11,000,000 represented the proportion from Canada. It is estimated that a large percentage of the parcels contained foodstuffs and other gift produce, forwarded by postal service by friends overseas. The value of parcels received from the United States and Australia was $14,512,000 and $13,410,000 respectively, these amounts being slightly larger than the figure for Canada. Total imports last year were valued at £2,079,537,813, of which £16,071,655 represented merchandise arriving by parcel post.

British Parcel Post Imports

	1938	1947	1948
Total	£4,339,379	£17,859,036	£16,071,655
Principal Sources			
Canada	£ 484,575	£2,277,083	£2,730,702
United States	644,484	3,812,261	3,601,254
Australia	149,847	3,301,695	3,350,507
South Africa	332,739	1,275,476	1,572,946
New Zealand	38,748	1,264,430	1,082,813
India, Pakistan	315,390	904,768	481,607

British Imports of Canadian Silk and Artificial Silk Yarns Increased

British purchases of silk and artificial silk yarns and manufactures and apparel from Canada increased, while total imports of these commodities declined. There was, however, drastic reductions in imports of Canadian footwear, due to the curtailment of licences for rubber footwear, and also in purchases of leather and manufactures.

There was a fall in overall imports of silk and artificial silk yarns and manufactures of 7 per cent. The value entered from Canada under this item was 40 per cent more than in 1947.

	1938	1947	1948
Total	£4,946,149	£8,572,320	£7,910,235
Principal Sources			
Canada	£ 69,326	£ 27,084	£ 37,759
Belgium	107,370	514,452	239,361
Italy	362,192	1,425,527	1,151,162
Switzerland	654,217	532,664	676,809

British Imports of Apparel from Canada Higher

There was a decline as compared with 1947 in imports of apparel, the value of which in 1948 was less than one-half the prewar figure. The only country supplying a greater value of apparel than in the previous year was Canada, whose contribution increased by 6 per cent.

	1938	1947	1948
Total	£8,027,856	£3,375,245	£3,112,938
Principal Sources			
Canada	£ 411,803	£ 240,456	£ 254,296
France	698,937	784,557	628,640
Czechoslovakia	1,349,896	910,638	571,886
United States	772,507	614,005	485,978

British Imports of Canadian Footwear Drastically Reduced

There was a drastic fall of 41 per cent in the value of footwear brought in from Canada, due almost entirely to a curtailment of licences for rubber footwear. The contraction in imports from all countries was 2 per cent and the heaviest reduction was suffered by Czechoslovakia.

	1938	1947	1948
Total	£2,794,347	£2,720,354	£2,090,009
Principal Sources			
Canada	£ 818,565	£ 860,545	£ 406,671
France	39,686	251,983	200,781
Czechoslovakia	605,853	672,077	169,191

British Imports of Leather and Manufactures Curtailed

Severe setback was suffered by the leather and manufactures trade. The volume of imports was less than one-half that of 1947. All suppliers with the exception of Australia shared in the reduction. Canadian exporters took the biggest loss, sending only one-seventh the 1947 amount.

Total	1938	1947	1948
Cwts.	285,906	378,782	169,403
£	1,547,778	6,565,314	2,833,183
Principal Sources		(Cwts.)	
Canada	5,273	5,404	787
India, Pakistan	234,835	301,941	134,839
South Africa	54	46,092	10,332
Australia	11,376	11,217	11,454

British Imports of Undressed Fur Skins Reduced

The United Kingdom fur trade is experiencing heavy weather on account of currency restrictions and trade controls in this and other countries. Special arrangements have been made by the Board of Trade for the continuance of the trade under conditions which prevent a drain on hard-currency reserves. There was a slight increase in the quantity of furs brought in from Canada, but total imports fell by 24 per cent. The fur trade claims that it had an overall credit balance on its international operations in 1948. In 1947 and 1946 there was an adverse balance.

Total	1938	1947	1948
Cwts.	.....	3,290,688	2,540,638
£	18,233,113	39,879,629	34,662,255
Principal Sources		(Cwts.)	
Canada	5,384	3,476	3,664
United States	13,832	9,480	8,447
Soviet Union	19,650	3,042	5,417

No British Imports of Fish Oil from Canada Last Year

Canada was excluded from the United Kingdom fish oil market in 1948 for exchange reasons. The gap was more than filled by Iceland and the British deep-sea fisheries.

Total	1938	1947	1948
Tons	21,252	21,968	26,777
£	366,163	3,841,824	4,274,237
Principal Sources		(Tons)	
Canada	5,377	53	.....
Iceland	534	9,259	11,504
British whale fisheries	69	7,835	10,356

British Imports of Linseed Oil Reduced

Difficulty in arranging contracts with Argentina for linseed oil at acceptable prices led to a 60 per cent shrinkage in imports from that country and the same percentage reduction in total imports. As might be expected, demand for linseed oil is exceptionally heavy in the paint industry owing to the large quantity required in repairs and renovations. There was a useful contribution from Canada of 3,561 tons.

Total	1938	1947	1948
Tons	18,832	111,730	46,310
£	391,969	19,153,505	7,268,689
Principal Sources		(Tons)	
Canada	.....	581	3,561
Argentina	.....	107,110	40,543

British Imports of Plastics Declined

Before the war the plastic industry in the United Kingdom was relatively small. Now the trade makes an important contribution to the economy. Total imports as well as imports from Canada and the United States fell about 30 per cent in 1938. Casein, celluloid and like materials are not included in this item.

Total	1938	1947	1948
Cwts.	24,513	237,484	164,394
£	130,945	2,862,837	1,737,665
Principal Sources		(Cwts.)	
Canada	990	72,768	51,618
United States	11,290	159,965	108,385

British Purchases of Chemicals Increased

The United Kingdom's purchases of chemicals, drugs, dyes and colours from abroad advanced by 19 per cent, Canada's share increasing by 14 per cent. Germany is coming back in this traditional trade, selling more than double the 1947 value and rising to second place, after the United States, in the list of supplying countries.

	1938	1947	1948
Total	£13,612,693	£26,718,918	£31,402,129
Principal Sources			
Canada	£ 636,381	£1,465,470	£1,642,231
United States	2,834,560	9,207,266	9,097,961
Germany	3,997,884	2,134,031	4,935,521
France	1,031,517	1,788,525	2,198,137
South Africa	271,346	1,253,248	1,983,302

British Imports of Canadian Electrical Apparatus Lower

Essential capital equipment in short supply is licensed for import. The bulk originates in the United States and Canada and is eligible for payment out of ECA funds.

Imports from Canada of electrical apparatus were, in value, 20 per cent lower than in 1947, while United States supplies remained the same.

As regards machinery, the quantity sent from Canada went up by 7 per cent and from the United States by 51 per cent. Imports from Germany have again become important. The principal types of machinery imported were agricultural machinery, excavators (largely for open cast mining), machine tools and textile machinery.

Electrical Goods and Apparatus

Total	1938	1947	1948
£	£3,156,024	£2,302,240	£2,621,774
Principal Sources			
Canada	£ 67,724	£ 567,049	£ 451,979
United States	934,579	1,070,062	1,007,195
Netherlands	468,640	234,718	250,575

Machinery			
Total			
Tons	121,850	80,323	116,620
£	21,603,509	28,792,522	43,867,158
Principal Sources		(Tons)	
Canada	8,646	6,902	7,436
United States	39,000	48,784	74,076
Germany	36,868	10,199	9,906

British Imports of Cutlery, Hardware, Implements and Instruments Higher

Imports of cutlery, hardware, implements and instruments rose by some 20 per cent and Canada's share by 24 per cent.

Total	£7,061,696	£5,128,361	£6,539,314
Principal Sources			
Canada	£ 589,997	£ 426,589	£ 531,314
Switzerland	1,566,998	1,835,686	2,215,920
United States	1,666,298	1,765,086	1,992,179
France	391,205	412,078	612,652

British Imports of Canadian Furniture Sharply Reduced

The general level of imports of furniture and cabinet-ware was well maintained, but there were variations in sources of supply. Imports from Canada sank to one-seventh of their 1947 value, due to the expiration of the furniture parts contracts. Czechoslovakian shipments went up by 27 per cent and purchases from Italy were multiplied by nearly 100.

Total	1938	1947	1948
£	£ 403,121	£2,047,466	£2,143,150
Principal Sources			
Canada	£ 5,724	£ 221,224	£ 32,730
Czechoslovakia	48,530	771,663	979,303
Italy	6,695	6,290	582,505
Hungary	80,488	2	206,300

British Imports of Books Slightly Higher

There was a small increase in imports of books in 1948. During the year, however, restrictions were considerably tightened and, in consequence, the quantity brought in from Canada dropped to one-third the 1947 figure. It is still double the prewar volume.

Total	1938	1947	1948
Cwts.	322,805	223,862	236,573
£	£1,377,334	£3,283,720	£2,946,891
Principal Sources		(Cwts.)	
Canada	5,495	32,048	10,563
United States	226,923	96,940	104,753
Ireland	36,297	34,222	37,934
Netherlands	8,549	29,276	30,617

Import Control on Structural Steel Revoked

The import control on structural iron and steel classified under tariff items Nos. 388, 388a, 388b, 388c and 388d is revoked.

Canada to Ship Asbestos to France

Paris, March 7, 1949.—(FTS)—France expects to receive 15,000 tons of Canadian asbestos during 1948-49. Russia and South Africa are returning to the market with 5,000 and 12,500 tons respectively. In addition, deposits of lower-grade qualities are now being actively developed in Corsica, with estimated deliveries for this and next year being about 6,000 and 12,000 tons, respectively.

Further Shipment of Canadian Dairy Cattle Made from Montreal to Italy This Week

Consignment of 125 head of purebred Holstein-Friesians loaded aboard S.S. Marchport—Seven bulls and five heifers were flown from Malton Airport last March, and four bulls from New York last year.

PROVISION was made for the shipment from Montreal this week of a further 125 head of purebred Holstein-Friesian cattle, with production records, to Italy. Four Canadian bulls, which were flown from New York to Rome last year, aroused so much interest that an order for 205 Canadian Holstein-Friesian cattle was placed this year. The first consignment, consisting of seven bulls and five heifers, left Malton Airport on March 28, this being the first direct air shipment of Canadian cattle from this country to Italy. These animals were accompanied by G. M. Clemons, Secretary of the Holstein-Friesian Association of Canada, and Albert Stagg, of Oakville, Ont., who spent some time in Italy studying the market possibilities for additional livestock. Their visit was made on the invitation of Fratta Fice, President of the Italian Livestock Association.

The consignment going forward this week was loaded aboard the *S.S. Marchport,* and will be followed at a later date this summer by 68 head, representing the balance of the order for which the necessary dollars were made available from Italian funds. Procurement authorizations, covering the purchase of additional livestock in Canada valued at $350,000, have been approved by the Economic Co-operation Administration, in Washington.

Hon. J. A. MacKinnon Returns Temporarily to Trade Department

Hon. James A. MacKinnon, who was recently elevated to the Canadian Senate, has been appointed Acting Minister of Trade and Commerce during the absence from Ottawa of the Right Hon. C. D. Howe. Mr. MacKinnon is fully familiar with the operations of this department, as much of its postwar expansion took place under his direction, and he headed trade missions to Latin America and South Africa during his term of office. It was in January, 1948, that he surrendered this portfolio to the Right Hon. Mr. Howe, and was successively Minister of Fisheries and Minister of Mines and Resources before being created a senator.

More French Counterpart Funds Released

Washington, April 26, 1949.—Release of an additional 25 billion francs, about $94,000,000, from French counterpart funds for investment and reconstruction programs in France for the month of May was announced by the Economic Co-operation Administration in Washington and in Paris. This sum brings French counterpart funds released thus far to 190 billion francs, about $800,000,000.

With the approval of the French government and ECA, the francs will be used to continue the postwar reconstruction of French industry and agriculture. Projects include the construction of electric power plants, coal and coke production installations, and the development of railroads.

Counterpart funds are local currencies deposited by European Recovery Plan countries in amounts equivalent to dollar grants received from ECA. They accumulate as the goods and services made available by ECA dollars are paid for by consumers in their own currencies and are used, with the approval of ECA, in other recovery work within the country.

Trade Fair News

Information of particular interest to firms planning participation in the Canadian International Trade Fair, being held in Toronto from May 30 to June 10, 1949, will be published from week to week in this column

Silver-plated pewter from England has arrived at the proper booth, as have Scottish textiles and English toys fresh from the British Industries Fair in London. Slippers, blankets and oxygen compression equipment from England all arrived on the same vehicle, closely followed by gin, sherry, port, scotch and rum from England, Scotland, Italy and Barbados. The Old English pub arrived in the same shipment with English textiles from twenty firms.

* * * *

This year exhibits and buildings will be well guarded with the addition, to the regular watchmen and guards, of the famous Royal Canadian Mounted Police personnel.

* * * *

Specific services to exhibitors are being streamlined, with the creation of a Service Centre, where all services such as painting, electrical work, floor cleaning, furniture polishing, rental of furniture, equipment and other things necessary to an exhibitor, can be dealt with by a single representative.

* * * *

Each building is to have its own information centre and superintendent to save needless running around and telephoning. More restaurants and snack bars are provided to speed up the service and eliminate crowding.

* * * *

Cuban cigars, candies, alcoholic beverages and canned and fresh pineapples will be added to the products of some 77 firms from 19 countries exhibiting in the *Food* and *Beverages* category for the first time this year. The Cuban display will be handled by Archibald Durland, Cuban Chief of Fairs and Exhibitions, who will be vested with authority by the various manufacturers to take orders for the various goods on display.

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A cable from Shanghai advises that, in spite of the local trouble, merchandise is safely en route to Toronto for the trade fair.

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It is hoped that included in the Yugoslavian products will be samples of the special match that has been developed in that country as a boon to pipe smokers. About four inches long, it is reported to be good for 100 strikings.

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By the time the fair opens, personally addressed invitations will have been sent out by the trade fair to over 200,000 businessmen and business firms interested in having executives see the products they will have on display.

Value of Bridge Building Industry Labour Increases

Gross value of work performed by concerns in the bridge building and structural steel work industry in 1947 amounted to $52,559,258, an increase of 31 per cent over the preceding year's figure of $40,122,695.—*Dominion Bureau of Statistics.*

Trade Commissioners on Tour

CANADIAN Trade Commissioners return periodically from their posts in foreign lands to familiarize themselves with conditions in this country and the special requirements of the commercial community. They are in a position to furnish information concerning markets in their respective territories and possible sources of supply. Exporters and importers are urged to communicate with these officers, when in their vicinity, and to discuss the promotion of their particular commercial interests, now and in the future. Arrangements for interviews with these trade commissioners should be made directly through the following offices in the areas concerned:

Ottawa—Foreign Trade Service Department of Trade and Commerce

Brantford—Board of Trade.
Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Galt—Board of Trade.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Kingston—Chamber of Commerce.
Kitchener—Chamber of Commerce.
London—Chamber of Commerce.
Moncton—Board of Trade.
Montreal—Montreal Board of Trade.
Niagara Falls—Chamber of Commerce.
Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Saint John—Board of Trade.
Sarnia—Chamber of Commerce.
Saskatoon—Board of Trade.
Sherbrooke—Chamber of Commerce.
St. Catharines—Chamber of Commerce.
Toronto—Canadian Manufacturers' Association.
Vancouver—Department of Trade and Commerce, 355 Burrard Street.
Victoria—Department of Trade and Industry.
Welland—Board of Trade.
Windsor—Chamber of Commerce.
Winnipeg—Canadian Manufacturers' Association.

C. Blair Birkett, Canadian Government Trade Commissioner in Guatemala since 1946, has returned home on leave before proceeding to another post. He is making a tour of Canada, discussing trade conditions in Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua with businessmen interested in that territory.

Toronto—June 6-11.
Hamilton—June 13.
Kitchener—June 14.
Winnipeg—June 16.
Vancouver—June 20-25.
Ottawa—June 30.

Douglas S. Cole, Commercial Counsellor for Canada in Mexico City, has returned home on leave, and will tour this country during the present summer, discussing with businessmen conditions in Mexico and opportunities for the further development of trade between that country and Canada.

Montreal—May 18-27.
Toronto—May 30-June 8.
Hamilton—June 9-10.
Winnipeg—June 16-18.
Vancouver—June 27-July 2.
Victoria—July 4.

R. E. Gravel, Assistant Commercial Secretary for Canada in Buenos Aires, Argentina, has returned home on leave before proceeding to another post. He is touring Canada, discussing trade conditions in Argentina, Uruguay and Paraguay with businessmen interested in that territory.

Montreal—May 11-23.
Kingston—May 25.
Batawa—May 26.
Toronto—May 27-June 7.
Hamilton—June 8.
St. Catharines—June 9.
Welland—June 10.
Niagara Falls—June 11.
Brantford—June 13.
London—June 14.
Windsor-Walkerville—June 15.
Sarnia—June 16.
Kitchener—June 17-18.
Galt-Preston—June 20.
Winnipeg—June 23.
Vancouver-Victoria—June 27-July 2.
Ottawa—July 14-16.

Howard W. Richardson, Canadian Government Trade Commissioner in Bogotá, has returned home on leave. He will make a tour of Canada, discussing trade conditions in Colombia, the Republic of Panama and the Canal Zone with businessmen interested in that territory.

Ottawa—May 17-24.
Montreal—May 25-June 6.
Kingston—June 7.
Toronto—June 8-21.
Saint John—June 23-24.
Halifax—June 27-28.
Quebec—June 29-30.

Additional Italian Land Reclamation Projects Approved by ECA

Washington, April 28, 1949.—Six additional land reclamation projects in Italy, to be developed at a cost of 2,179,250,000 lire (about $3,900,000) from Italian counterpart funds, have been approved by the Economic Co-operation Administration.

The projects will provide immediate employment for more than 5,800 workers and will improve hundreds of thousands of acres through irrigation, flood control and swamp drainage. Farmers will find it less difficult to market their products and will have easier access to their fields through the construction of new highways and the improvement of existing roads.

All the projects are in southern Italy, two in the Sibari area and one each in the Neto River Valley, the Metaponto region, the Bradano River area and the Burano Lake area. They have been approved by the Italian government and ECA as important steps in Italy's over-all agricultural development program.

Benelux Countries Introducing Plan for Preliminary Union

The Hague, April 23, 1949.—(FTS)—The Benelux countries, Belgium, the Netherlands and Luxemburg, will introduce a plan for preliminary union on July 1, 1949. One year later, complete economic union will become effective, provided sufficient progress has been made during the previous twelve months in solving problems. This decision was taken at a recent conference of Benelux ministers, meeting in The Hague. July has been selected as the month in which to introduce the new plan, as ECA allocations are made then.

The pre-union year will be characterized by a gradual decontrol of commodity trade between the Netherlands and Belgium, the systematic co-ordination of the commercial and monetary policies of the partners, as these concern third parties, and by the preparation of a regime under which the partners can enter jointly into agreements with third parties.

Principal among the problems to be solved during the pre-union year is the co-ordination of the monetary and commercial policies between Holland and Belgium. For this reason "a monetary commission will be set up for the special supervision of the systematic co-ordination of extending trade and monetary policies". In order to enable the Netherlands to introduce the Pre-Union, the Benelux Economic Union "is prepared to grant the Netherlands Government adequate credits on the understanding that the amount of such credits shall be continually adjusted to the importance of the measures taken by the Netherlands Government for the decontrol of trade". If an overall balance is achieved in the international payments of the two economies, the three governments will pass from the pre-union stage to that of the economic union proper by July 1, 1950. On the same date a common system of financial settlements with third countries will be established.

Ocean-Going Sailing Schedules

Information contained in the following list of sailings is furnished by the steamship companies and agents concerned. This is the latest available, and is subject to change after *Foreign Trade* has gone to press.

The loading date and name of ship are not indicated in some instances, as information available is not sufficiently definite to mention the ship concerned. Exporters should seek further details from the operator or agent mentioned.

Ships loading within ten days of the publication date of this issue are not included.

Departures from Montreal

* Calls at Halifax about four days later.
† Calls at Quebec about two days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden—			
Port Aden	June 1–6	*Sommelsdijk*	Cunard Donaldson
Port Aden	June 27–July 2	*Tosari*	Cunard Donaldson
Africa-East—			
Lourenço Marques	June 1–10	*A Ship*	Elder Dempster
	June 5–10	*A Ship*	March Shipping
	June 15–25	*Cabano*	Elder Dempster
	June 20–25	*A Ship*	March Shipping
	June 25	*Constantia*	Shipping Limited
Lourenço Marques, Beira, Mombasa	June 25	*Thorsisle*	Kerr Steamships
Cape Town	June 1–10	*A Ship*	Elder Dempster
Port Elizabeth	June 15–25	*Cabano*	Elder Dempster
East London	June 25	*Constantia*	Shipping Limited
Durban	June 25	*Thorsisle*	Kerr Steamships
Cape Town, Port Elizabeth, Durban	June 5–10	*A Ship*	March Shipping
	June 20–25	*A Ship*	March Shipping
Argentina—			
Buenos Aires	May 31–June 4	*Bowgran*	Cunard Donaldson
Buenos Aires	June 6–7	*Mormactide*	Montreal Shipping
Australia—			
Brisbane, Sydney, Hobart, Freemantle, Melbourne, Adelaide	July 2	*Ashburton*	Montreal Australia New Zealand Line
Belgium—			
Antwerp	June 9–16	*Mont Gaspe*	Montreal Shipping
	June 10	*Prins Willem V*	Shipping Limited
	June 10–15	*Erik Banck*	Swedish American
	June 15	†*Beaverdell* (r)	Canadian Pacific
	June 15–20	*Brant County*	Canada Steamships
	June 17–23	*Tunaholm*	Swedish American
	June 25–29	*Sein*	Furness Withy
	June 25–30	*Hada County*	Canada Steamships
	June 26–July 3	*Beckenham*	Cunard Donaldson
	July 5–10	*Kent County*	Canada Steamships
	July 15–20	*Grey County*	Canada Steamships
	July 28–Aug. 2	*Brant County*	Canada Steamships

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Brazil—			
Rio de Janeiro	May 31–June 4	*Bowgran*	Cunard Donaldson
Santos	June 6–7	*Mormactide*	Montreal Shipping
China—			
Shanghai	June 16–21	*Ajax*	Cunard Donaldson
Colombia—			
Barranquilla	June 1–14	*Polykarp*	Swedish American
Barranquilla	June 16–22	*Brush*	Swedish American
Cuba—			
Havana	May 30–June 3	*Federal Pioneer*	Federal Commerce
	June 17–23	**Stegeholm*	Swedish American
Santiago	June 13–15	**Sunprince*	Saguenay Terminals
Denmark—			
Copenhagen	June 2	*Oris*	Brock Shipping
	June 3–5	*Erland*	Swedish American
	June 4–7	*Helgasmith*	Montreal Shipping
	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
Dominican Republic—			
Ciudad Trujillo	June 13–15	**Sunprince*	Saguenay Terminals
Egypt—			
Alexandria	June 1–6	*Sommelsdijk*	Cunard Donaldson
Port Said	June 27–July 2	*Tosari*	Cunard Donaldson
Suez			
Finland—			
Helsinki	June 3–5	*Erland*	Swedish American
	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
France—			
Le Havre	June 10	*Prins Willem V*	Shipping Limited
	June 15–20	*Brant County*	Canada Steamships
	June 17–23	*Tunaholm*	Swedish American
	June 25–29	*Sein*	Furness Withy
	June 25–30	*Hada County*	Canada Steamships
	July 5–10	*Kent County*	Canada Steamships
	July 15–20	*Grey County*	Canada Steamships
	July 28–Aug. 2	*Brant County*	Canada Steamships
Marseilles	July 1–5	*Capo Vita*	Furness Withy
Germany—			
Hamburg	June 9–16	*Mont Gaspe*	Montreal Shipping
	June 10	*Prins Willem V*	Shipping Limited
	June 10–15	*Erik Banck*	Swedish American
	June 17–23	*Tunaholm*	Swedish American
	June 26–July 3	*Beckenham*	Cunard Donaldson
Greece—			
Piraeus	June 15	*A Ship*	Monsen Clarke
Haiti—			
Port au Prince	June 13–15	**Sunprince*	Saguenay Terminals
Hong Kong	May 31–June 4	*Steel Vendor*	Isthmian Steamships
	June 16–21	*Ajax*	Cunard Donaldson
Indonesia—			
Batavia			
Samarang	June 1–6	*Sommelsdijk*	Cunard Donaldson
Soerabaya	June 27–July 2	*Tosari*	Cunard Donaldson
Cheribon			
Belawan-Deli			
Batavia	May 31–June 4	*Steel Vendor*	Isthmian Steamships
Belawan-Deli			

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Ireland—			
Dublin	May 29–June 3	*Lord Glentoran*	McLean Kennedy
Italy—			
Genoa	June 15	*A Ship*	Monsen Clarke
West Coast Ports	July 1–5	*Capo Vita*	Furness Withy
Malaya—			
Penang	May 31–June 4	*Steel Vendor*	Isthmian Steamships
Port Swettenham	June 1–6	*Sommelsdijk*	Cunard Donaldson
	June 27–July 2	*Tosari*	Cunard Donaldson
Malta—			
Valetta	June 7-14	*Anatina*	Montreal Shipping
Mediterranean—			
Central and Western Areas	June 7–14	*Anatina*	Montreal Shipping
Mexico—			
Tampico, Veracruz	June 17–23	**Stegeholm*	Swedish American
Progresso, Veracruz	May 30–June 3	*Federal Pioneer*	Federal Commerce
Netherlands—			
Amsterdam, Rotterdam	June 10	*Prins Willem V*	Shipping Limited
	June 10–15	*Erik Banck*	Swedish American
	June 15–20	*Brant County*	Canada Steamships
	June 17–23	*Tunaholm*	Swedish American
	June 25–30	*Hada County*	Canada Steamships
	June 26–July 3	*Beckenham*	Cunard Donaldson
	July 5–10	*Kent County*	Canada Steamships
	July 15–20	*Grey County*	Canada Steamships
	July 28–Aug. 2	*Brant County*	Canada Steamships
Rotterdam	June 9–16	*Mont Gaspe*	Montreal Shipping
Netherlands Antilles—			
Willhelmstad	June 1–4	**Polykarp*	Swedish American
Willhelmstad	June 16–22	*Brush*	Swedish American
New Zealand—			
Auckland, Wellington, Lyttleton, Dunedin	July 9	*Port Albany*	Montreal Australia New Zealand Line
Norway—			
Oslo	May 27–June 1	*Topdalsfjord*	Kerr Steamships
Kristiansand	June 3–5	*Erland*	Swedish American
Stavanger	June 10–15	*Erik Banck*	Swedish American
Bergen	June 17–23	*Tunaholm*	Swedish American
Bergen, Oslo, Stavanger	June 2	*Orin*	Brock Shipping
Philippines—			
Manila	May 31–June 4	*Steel Vendor*	Isthmian Steamships
Manila	June 16–21	*Ajax*	Cunard Donaldson
Poland—			
Gdynia	June 10–15	*Erik Banck*	Swedish American
Gdansk	June 17–23	*Tunaholm*	Swedish American
Portugal—			
Lisbon	June 7–14	*Anatina*	Montreal Shipping
Puerto Rico—			
San Juan	June 1–4	**Polykarp*	Swedish American
San Juan	June 16–22	*Brush*	Swedish American

Departures from Montreal—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Singapore	June 1–6	*Sommelsdijk*	Cunard Donaldson
	June 27–July 2	*Tosari*	Cunard Donaldson
Sweden—			
Gothenburg	June 3–5	*Erland*	Swedish American
Malmo	June 4–7	*Helgasmith*	Montreal Shipping
Norrkoping	June 10–15	*Erik Banck*	Swedish American
Stockholm	June 17–23	*Tunaholm*	Swedish American
Trieste	June 15	*A Ship*	Monsen Clarke
United Kingdom—			
Avonmouth	June 22–29	*Dorelian* (r)	Cunard Donaldson
Avonmouth	May 26–June 3	*Delilian* (r)	Cunard Donaldson
Swansea	June 15–20	†*Brazilian Prince*	Furness Withy
Glasgow	June 5–13	*Lismoria* (r)	Cunard Donaldson
	June 19–26	*Salacia* (r)	Cunard Donaldson
	June 26–July 4	*Laurentia* (r)	Cunard Donaldson
Liverpool	May 28–June 3	*Sibley Park*	Cunard Donaldson
	May 29–June 3	*Lord Glentoran*	McLean Kennedy
	June 3	*Empress of France* (r)	Canadian Pacific
	June 10–15	*Seaboard Queen*	March Shipping
	June 13–20	*Arabia* (r)	Cunard Donaldson
	June 16	*Beaverford*	Canadian Pacific
	June 16–20	*Ascania* (r)	Cunard Donaldson
	June 17	*Empress of Canada* (r)	Canadian Pacific
	June 24–28	*Fort Cadotte*	Cunard Donaldson
London	June 1–6	*Seaboard Trader*	March Shipping
	June 7–14	*Asia* (r)	Cunard Donaldson
	June 15	†*Beaverdell* (r)	Canadian Pacific
	June 17–24	*Fort Musquarro*	Cunard Donaldson
	June 22	*Beaverglen* (r)	Canadian Pacific
Manchester	June 1–4	†*Manchester Progress* (r)	Furness Withy
	June 8–11	*Manchester Shipper* (r)	Furness Withy
	June 15–18	*Manchester Trader* (r)	Furness Withy
Leith	June 9–15	*Cairnvalona*	Furness Withy
Newcastle	June 14–20	*Cairnavon*	Furness Withy
Uruguay—			
Montevideo	May 31–June 4	*Bowgran*	Cunard Donaldson
	June 6–7	*Mormactide*	Montreal Shipping
Vancouver	June 25–30	*A Ship*	March Shipping
Venezuela—			
Puerto Cabello	June 1–4	**Polykarp*	Swedish American
La Guaira	June 16–22	*Brush*	Swedish American
Maracaibo			
West Indies—			
Antigua	May 31–June 9	**Alcoa Patriot* (r)	Alcoa Steamships
Barbados	June 2 10	*Canadian Constructor* (r)	Canadian National
Bermuda	June 14–23	**A Ship*	Alcoa Steamships
British Guiana	June 28–July 7	**A Ship*	Alcoa Steamships
Dominica	July 12–21	**A Ship*	Alcoa Steamships
Grenada			
Montserrat			
St. Kitts			
St. Lucia			
St. Vincent			
Trinidad			
Jamaica	June 13–15	**Sunprince*	Saguenay Terminals

Departures from Quebec

*Calls at Montreal a few days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—			
Amsterdam	June 1–2	*Tabinta*	Furness Withy
Rotterdam	June 28–29	*Volendam*	Furness Withy
Netherlands Antilles—			
Curaçao	June 7–8	**Congo*	Saguenay Terminals
United Kingdom—			
Greenock	June 8–12	*Franconia* (r)	Cunard Donaldson
Liverpool			
Liverpool	July 8	*Franconia* (r)	Cunard Donaldson
London	June 5–9	*Samaria* (r)	Cunard Donaldson
London	June 19–23	*Scythia* (r)	Cunard Donaldson
Venezuela—			
La Guaira	June 7–8	**Congo*	Saguenay Terminals
Puerto Cabello			
Maracaibo			
Las Piedras			

Departures from Halifax

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Cuba—			
Santiago	June 28–30	*Magister*	Pickford and Black
Dominican Republic—			
Ciudad Trujillo	June 28–30	*Magister*	Pickford and Black
Haiti—			
Port au Prince	June 28–30	*Magister*	Pickford and Black
Jamaica—			
Kingston	June 28–30	*Magister*	Pickford and Black
United Kingdom—			
Liverpool	June 8–13	*Nova Scotia* (r)	Furness Withy
Southampton	June 6	*Aquitania*	Cunard Donaldson
Southampton	July 2	*Aquitania*	Cunard Donaldson

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—	June 2–19	*Riley*	North Pacific
	June 7	*Radja*	Dingwall Cotts
Lourenço Marques	June 9	*Crowborough Hill*	B. W. Greer and Son
	June 15	*Master Elias Kulunkundis*	B. W. Greer and Son
	June 17	*Cimon*	B. W. Greer and Son
	July 8	*Silvermaple*	Dingwall Cotts

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Africa-South—	June 2–19	*Riley*	North Pacific
	June 7	*Radja*	Dingwall Cotts
Cape Town	June 9	*Crowborough Hill*	B. W. Greer and Son
Port Elizabeth	June 15	*Master Elias*	B. W. Greer and Son
East London		*Kulunkundis*	
Durban	June 17	*Cimon*	B. W. Greer and Son
	July 8	*Silvermaple*	Dingwall Cotts
Argentina—			
Buenos Aires	June 1	*Hindanger*	Empire Shipping
Australia—			
Sydney	June 12	*Ventura*	Dingwall Cotts
Melbourne	July 15	*Mattawunga*	Empire Shipping
Adelaide			
Sydney	June 3	*Sonoma*	Dingwall Cotts
Melbourne			
Brisbane			
Hobart	June 9	*Waikawa*	Canadian Australasian
Melbourne			
Sydney			
Belgium—	June 1	*Argentan*	Empire Shipping
	June 12	*Los Angeles* (r)	Gardner Johnson
Antwerp	July 4	*Paraguay* (r)	Gardner Johnson
	July 10	*Pont l'Eveque*	Empire Shipping
Brazil—			
Rio de Janeiro	June 1	*Hindanger*	Empire Shipping
Santos			
Burma—			
Rangoon	June 5	*Lawak*	Dingwall Cotts
Canal Zone—	June 1	*Santa Leonor* (r)	Gardner Johnson
Balboa	June 6	*Clove Hitch*	Gardner Johnson
Cristobal	June 9	*Timber Hitch*	Gardner Johnson
Ceylon—	June 10	*Höegh Silverbeam*	Dingwall Cotts
Colombo	June 27	*Sarangan*	Dingwall Cotts
Chile—			
Arica	June 1	*Hindanger*	Empire Shipping
Antofagasta	June 1	*Santa Leonor* (r)	Gardner Johnson
Valparaiso	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
China—			
Shanghai	June 3–4	*Mirrabooka*	Empire Shipping
Shanghai	June 28	*Mongabarra*	Empire Shipping
Colombia—	June 6	*Clove Hitch*	Gardner Johnson
Barranquilla	June 9	*Timber Hitch*	Gardner Johnson
	June 10	*Glimmaren*	Empire Shipping
	June 27	*Anchor Hitch*	Gardner Johnson
	June 1	*Santa Leonor* (r	Gardner Johnson
Buenaventura	June 10	*Glimmaren*	Empire Shipping
	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
Costa Rica—	June 6	*Clove Hitch*	Gardner Johnson
Puntarenas	June 9	*Timber Hitch*	Gardner Johnson
	June 10	*Glimmaren*	Empire Shipping
	June 27	*Anchor Hitch*	Gardner Johnson
Ecuador—	June 1	*Santa Leonor* (r)	Gardner Johnson
Guayaquil	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
El Salvador—			
La Libertad	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 10	*Glimmaren*	Empire Shipping
	June 27	*Anchor Hitch*	Gardner Johnson
Fiji—			
Suva	Late June	*Thor I*	Empire Shipping
Suva	Late July	*Thorscape*	Empire Shipping
France—			
Le Havre	June 1	*Argentan*	Empire Shipping
Marseilles	July 10	*Pont l'Eveque*	Empire Shipping
Germany—			
Hamburg	June 12	*Los Angeles* (r)	Gardner Johnson
	July 4	*Paraguay* (r)	Gardner Johnson
Greece—			
Piraeus	June 1–15	*Rookley*	Canada Shipping
Guatemala—			
San Jose	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 10	*Glimmaren*	Empire Shipping
	June 27	*Anchor Hitch*	Gardner Johnson
Hong Kong	June 3–4	*Mirrabooka*	Empire Shipping
	June 28	*Mongabarra*	Empire Shipping
India and Pakistan—			
Karachi, Bombay	June 10	*Höegh Silverbeam*	Dingwall Cotts
Bombay, Calcutta	June 18	*Saparoea*	Dingwall Cotts
Bombay	June 27	*Sarangan*	Dingwall Cotts
Madras, Calcutta	June 5	*Lawak*	Dingwall Cotts
Indonesia—			
Batavia	June 5	*Lawak*	Dingwall Cotts
Soerabaya	June 10	*Höegh Silverbeam*	Dingwall Cotts
Samarang	June 18	*Saparoea*	Dingwall Cotts
Cheribon	June 27	*Sarangan*	Dingwall Cotts
Italy—			
Genoa, Naples, Venice	June 28	*Etna*	Empire Shipping
Malaya—			
Penang	June 18	*Saparoea*	Dingwall Cotts
Mediterranean—			
Central and Western Areas	June 1-15	*Rookley*	Canada Shipping
Mexico—			
Manzanillo	June 6	*Clove Hitch*	Gardner Johnston
Acapulco	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson
Netherlands—			
Amsterdam, Rotterdam	June 1	*Argentan*	Empire Shipping
	July 10	*Pont l'Eveque*	Empire Shipping
New Caledonia—			
Noumea	Late June	*Thor I*	Empire Shipping
Noumea	Late July	*Thorscape*	Empire Shipping
New Hebrides—			
Port Vila	Late June	*Thor I*	Empire Shipping
Port Vila	Late July	*Thorscape*	Empire Shipping

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
New Zealand—			
Auckland, Wellington	June 9	*Waikawa*	Canadian Australasian
Wellington	June 12	*Ventura*	Dingwall Cotts
Persian Gulf	June 10	*Höegh Silverbeam*	Dingwall Cotts
Peru—			
Callao	June 1	*Hindanger*	Empire Shipping
Callao	June 1	*Santa Leonor* (r)	Gardner Johnson
Mollendo	June 21	*Santa Adela* (r)	Gardner Johnson
	July 2	*Santa Flavia* (r)	Gardner Johnson
Philippines—			
Manila, Iloilo, Cebu	June 10	*Höegh Silverbeam*	Dingwall Cotts
	June 27	*Sarangan*	Dingwall Cotts
Manila, Iloilo	June 5	*Lawak*	Dingwall Cotts
Manila	June 3–4	*Mirrabooka*	Empire Shipping
Cebu	June 18	*Saparoea*	Dingwall Cotts
	June 28	*Mongabarra*	Empire Shipping
Samoa—	June 9	*Waikawa*	Canadian Australasian
Apia	Late June	*Thor I*	Empire Shipping
	Late July	*Thorscape*	Empire Shipping
Pago-Pago	June 3	*Sonoma*	Dingwall Cotts
Pago-Pago	June 12	*Ventura*	Dingwall Cotts
Singapore	June 18	*Saparoca*	Dingwall Cotts
Society Islands—	June 9	*Waikawa*	Canadian Australasian
Papeete	Late June	*Thor I*	Empire Shipping
	Late July	*Thorscape*	Empire Shipping
Sweden—			
Stockholm, Gothenburg	June 12	*Los Angeles* (r)	Gardner Johnson
	July 4	*Paraguay* (r)	Gardner Johnson
Trieste	June 28	*Etna*	Empire Shipping
United Kingdom—			
Cardiff	May 27–June 10	*Lake Pennask*	Anglo Canadian
Manchester	June 7	*Pacific Exporter*	Furness Withy
Unstated Ports	June	*Oceanside*	Seaboard Shipping
	June 3–18	*Lake Shawnigan*	Anglo Canadian
	June 8–23	*Lake Tatla*	Canada Shipping
Uruguay—			
Montevideo	June 1	*Hindanger*	Empire Shipping
Venezuela—			
Maracaibo	June 6	*Clove Hitch*	Gardner Johnson
	June 9	*Timber Hitch*	Gardner Johnson
	June 27	*Anchor Hitch*	Gardner Johnson

ECA Funds Will Buy United States Pork

Washington, April 29, 1949.—The Economic Co-operation Administration today issued a procurement authorization to the United Kingdom for $21,000,000 to buy pork in the United States.

Services to Newfoundland

Transportation is a major factor in the economy of Newfoundland, which is served by a number of steamship services operating the year round from Halifax and North Sydney, and from Montreal during the season of open navigation on the St. Lawrence. Trans-Canada Air Lines also maintains a daily service between Montreal and Gander Airport, via Moncton, N.B., and Sydney, N.S. Boston is likewise connected with Gander Airport, via Yarmouth, N.S., Saint John, N.B., and Halifax, N.S. Steamship companies, ports of call and the frequency of their services are as follows:

Halifax to St. John's	Weekly	Furness Red Cross Line
Halifax to St. John's	Every three weeks	Furness Warren Line
Halifax to St. John's	Every ten days	Newfoundland-Canada Steamships
Halifax to St. John's	Fortnightly	Rowlings
Halifax to St. John's	Weekly	Shaw Steamships
Montreal to St. John's	Every ten days	Blue Peter Steamships
Montreal to St. John's	Fortnightly	Clarke Steamships
Montreal to Corner Brook	Fortnightly	Clarke Steamships
Montreal to St. John's	Fortnightly	Newfoundland-Canada Steamships
North Sydney to Port aux Basques	Tri-weekly	Canadian National Railways
Hamilton to St. John's	Fortnightly	Newfoundland-Great Lakes SS.
Toronto to St. John's	Fortnightly	Newfoundland-Great Lakes SS.

Wool or Hair Sliver Strands Accorded New Tariff Treatment

During the period February 1, 1949, to March 31, 1950, the undermentioned product is accorded the tariff treatment hereunder indicated: Sliver strands in warp form, wholly or in part of wool or hair, imported by manufacturers of braided mats and rugs, for use in the manufacture of such articles in their own factories: British preferential tariff, free; most-favoured-nation tariff, free; and general tariff, 20 per cent and 17½ cents per pound.

Visitors to Britain Get Gasoline Allowances

Visitors to Britain last year were issued with special tourist voucher books which enabled them to buy clothing and rationed goods. The British Board of Trade has announced that, as clothing is no longer rationed, this scheme has been discontinued. It was highly successful during the eleven months it lasted, 81,500 books being issued and more than 214,000 vouchers used. They were spent in buying goods valued at £1,057,000.

These books were also used for gasoline when hiring cars. The Board of Trade announced that special arrangements have been made to enable visitors to continue to enjoy these facilities. All that is now required is to complete a simple form for journeys over 20 miles. This is to provide means whereby the driver or hirer of the car can reclaim the gasoline expended on such journeys.

Extra gasoline will be issued to owners of motorboats hired by overseas visitors. A similar formality is all that is required.

Those who bring their own cars or buy one in Britain are provided with a generous allowance of coupons on landing. This is sufficient to cover a journey to their farthest destination in Britain and back to the port. There is also a touring allowance in addition. For those staying 14 days, this is enough for 600 miles, increasing to 800 for a three weeks' visit. Those who remain one month may have enough to travel 1,000 miles, while the maximum allowance for a longer stay is sufficient for 1,500 miles touring.—*(United Kingdom News)*

Foreign Trade Service Abroad

Cable address:—Canadian, unless otherwise shown.
Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

Buenos Aires—H. L. Brown, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.
Territory includes Uruguay and Paraguay.

Buenos Aires—W. B. McCullough, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre 478.

Australia

Sydney—C. M. Croft, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.
Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Melbourne—F. W. Fraser, Commercial Secretary for Canada, 83 William Street.
Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. Ausman, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boîte Postale 373.
Territory includes Angola and French Equatorial Africa.

Belgium

Brussels—B. A. Macdonald, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.
Territory includes Luxemburg.

Brazil

Rio de Janeiro—Maurice Bélanger, Commercial Secretary, Canadian Embassy, Edificio Metropòle. Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

São Paulo—Acting Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—E. H. Maguire, Commercial Secertary, Canadian Embassy, Bank of London and South America Building. Address for letters: Casilla 771.
Territory includes Bolivia.

China

Shanghai—L. M. Cosgrave, Commercial Counsellor for Canada, 27 The Bund. Postal District (0).

Colombia

Bogotá—H. W. Richardson. Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.
Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—A. W. Evans, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.
Territory includes Haiti, Dominican Repubic and Puerto Rico.

Egypt

Cairo—J. M. Boyer, Canadian Government Trade Commissioner, 22 Sharia Kasr el Nil. Address for letters: Post Office Box 1770.
Territory includes Aden, Anglo-Egyptian Sudan, Cyprus, Ethiopia, Iraq, Israel, Lebanon, Saudi Arabia, Syria and Transjordan.

France

Paris—J. P. Manion, Commercial Secretary, Canadian Embassy. Address for letters: 3 rue Scribe.
Territory includes Algeria, French Morocco and Tunisia.

Paris—J. H. Tremblay, Commercial Secretary (Agricultural Specialist), Canadian Embassy. Address for letters: 3 rue Scribe.
Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. Bachand, Canadian Economic Representative, Canadian Consulate, Economic Section, 145 Fuerstenbergerstrasse, A.P.O. 757, U.S. Army.
Cable address, Canadian Frankfurt/Main.

Greece

Athens—T. J. Monty, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.

Foreign Trade Service Abroad—*Continued*

Guatemala

Guatemala City—J. C. Depocas, Canadian Government Trade Commissioner, No. 20, 4th Avenue South. Address for letters: Post Office Box 400.
Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. Noble, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.
Territory includes South China, the Philippine Islands and French Indo-China.

India

New Delhi—Richard Grew, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 11.

Bombay—C. R. Gallow, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.
Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. Priestman, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Italy

Rome—R. G. C. Smith, Commercial Secretary, Canadian Embassy, Via Saverio Mercadante 15-17.
Territory includes Malta, Yugoslavia and Libya.

Jamaica

Kingston—M. B. Palmer, Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.
Territory includes the Bahamas and British Honduras.

Japan

Tokyo—J. C. Britton, Commercial Representative, Canadian Liaison Mission, Canadian Legation Building.

Mexico

Mexico City—D. S. Cole, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. Langley, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

New Zealand

Wellington—P. V. McLane, Commercial Secretary, Office of the High Commissioner for Canada, Government Life Insurance Building. Address for letters: Post Office Box 1660.
Territory includes Fiji and Western Samoa.

Wellington—Dr. W. C. Hopper, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Government Life Insurance Building. Address for letters: Post Office Box 1660.

Norway

Oslo—S. G. MacDonald, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.
Territory includes Denmark and Greenland.

Pakistan

Karachi—R. K. Thomson, Acting Canadian Government Trade Commissioner, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531.
Territory includes Iran and Afghanistan.

Peru

Lima—C. J. Van Tighem, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.
Territory includes Ecuador.

Portugal

Lisbon—L. S. Glass, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.
Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

Singapore

Singapore—Paul Sykes, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.
Territory includes Federation of Malaya, Indonesia, North Borneo, Brunei, Sarawak and Siam.

South Africa

Johannesburg—S. V. Allen, Commercial Secretary for Canada, Mutual Building, Harrison Street. Address for letters: Post Office Box 715 .
Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, Kenya, Nyasaland, Tanganyika and Uganda.
Cable address, Cantracom.

Foreign Trade Service Abroad—*Concluded*

Cape Town—S. G. Tregaskes, Acting Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.
Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.
Cable address, Cantracom.

Sweden

Stockholm—F. H. Palmer, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.
Territory includes Finland.

Switzerland

Berne—Yves Lamontagne, Commercial Counsellor, Canadian Legation, Thunstrasse 95.
Territory includes Austria, Czechoslovakia and Hungary.

Trinidad

Port-of-Spain—T. G. Major, Canadian Government Trade Commissioner, 43 St. Vincent Street. Address for letters: Post Office Box 125.
Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

Turkey

Istanbul—G. F. G. Hughes, Acting Commercial Secretary for Canada, 20 Yeni Carsi Caddesi, Beyoglu. Address for letters: Post Office Box 2220, Beyoglu.

United Kingdom

London—A. E. Bryan, Commercial Counsellor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Sleighing, London.

London—R. P. Bower, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).
Cable address, Sleighing, London.

London—W. B. Gornall, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Cantracom, London.

London—R. D. Roe, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Timcom, London.

Liverpool—M. J. Vechsler, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.
Territory includes the Midlands, North of England and Wales.

Glasgow—J. L. Mutter, Canadian Government Trade Commissioner, 200 St. Vincent Street.
Territory covers Scotland and Iceland.
Cable address, Cantracom.

Belfast—H. L. E. Priestman, Canadian Government Trade Commissioner, 36 Victoria Square.
Territory covers Northern Ireland .

United States

Washington—J. H. English, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. Paterson, Agricultural Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. Stewart, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Center.
Territory includes Bermuda.
Cable address, Cantracom.

New York City—M. B. Bursey, Canadian Government Trade Commissioner (Fisheries Specialist), British Empire Building, Rockefeller Center.

Boston—T. F. M. Newton, Consul of Canada, 532 Little Building, 80 Bolyston Street, Boston 16.

Detroit—J. J. Hurley, Consul of Canada, Canadian Consulate, 1035 Penobscot Building, Detroit 26, Michigan.

Chicago—Edmond Turcotte, Consul-General of Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

Los Angeles—V. E. Duclos, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

San Francisco—H. A. Scott, Consul-General of Canada, 3rd floor, Kohl Building, 400 Montgomery Street.

Venezuela

Caracas—C. S. Bissett, Canadian Government Trade Commissioner, Canadian Consulate General, 8° Piso, Edificio America, Esquina Veroes.
Territory includes Netherlands Antilles.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations May 9	Nominal Quotations May 16
Argentina	Peso	Off.	·2977	·2977
		Free	·2085	·2085
Australia	Pound	....	3·2240	3·2240
Belgium and Belgian Congo	Franc	....	·0228	·0228
Bolivia	Boliviano	....	·0238	·0238
British West Indies (except Jamaica)	Dollar	....	·8396	·8396
Brazil	Cruzerio	....	·0544	·0544
Chile	Peso	Off.	·0517	·0517
		Export	·0322	·0322
Colombia	Peso	....	·5128	·5128
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	Off.	·0036	·0036
		Free	·0030	·0030
French Empire—African	Franc	....	·0073	·0073
French Pacific Possessions	Franc	....	·0201	·0201
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	....	·1541	·1541
India	Rupee	....	·3022	·3022
Indonesia	Florin	....	·3769	·3769
Iraq	Dinar	....	4·0300	4·0300
Ireland	Pound	....	4·0300	4·0300
Israel	Pound	....	3·0000	3·0000
Italy	Lira	....	·0017	·0017
Jamaica	Pound	....	4·0300	4·0300
Japan	Yen	....	·0027	·0027
Mexico	Peso	....	·1273	·1254
Netherlands	Florin	....	·3769	·3769
Netherlands Antilles	Florin	....	·5302	·5302
New Zealand	Pound	....	4·0150	4·0150
Norway	Krone	....	·2015	·2015
Pakistan	Rupee	....	·3022	·3022
Peru	Sol	....	·1538	·1538
Philippines	Peso	....	·4975	·4975
Portugal	Escudo	....	·0403	·0403
Siam	Baht	....	·1000	·1000
Singapore	Dollar	....	·4701	·4701
Spain	Peseta	....	·0916	·0916
Sweden	Krona	....	·2783	·2783
Switzerland	Franc	....	·2336	·2336
Turkey	Lira	....	·3571	·3571
Union of South Africa	Pound	....	4·0300	4·0300
United Kingdom	Pound	....	4·0300	4·0300
United States	Dollar	....	1·0000	1·0000
Uruguay	Peso	Controlled	·6583	·6583
		Uncontrolled	·5618	·5618
Venezuela	Bolivar	....	·2985	·2985

Trade Publications Available

ABC of Canadian Export Trade

Prepared by Export Division, Foreign Trade Service. Obtainable from King's Printer, Government Printing Bureau, Ottawa, for 25 cents a copy in Canada and 50 cents for delivery abroad.

Canada—Butcher, Baker, Grocer

Brochure, illustrating the extent to which foodstuffs are being shipped to the United Kingdom, prepared for distribution at the Dairy Show, in London, England, and to the provision trade in Great Britain. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Canadian Export Timbers

Brochure, illustrating and describing Canadian woods available for export, prepared for distribution at Building Trades Exhibition, in Manchester, England. Obtainable from King's Printer, Government Printing Bureau, Ottawa, for 25 cents.

Canadian Furs

Brochure, pertaining primarily to ranched furs, prepared for distribution at International Fur and Leather Fair, in Basle, Switzerland. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Canadian Certified Seed Potatoes

Folder, illustrating varieties most suitable for shipment to other countries, prepared for distribution abroad in an effort to stimulate export sale of seed potatoes. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Eighty Years of Foreign Trade

Reprint of article in *Canadian Geographical Journal,* which reviews development of Canada's trade between 1867 and 1947. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Reprints of Economic Reviews

Reports on the following countries, reproduced originally in the *Commercial Intelligence Journal and Foreign Trade*: Argentina, Australia, British West Indies and British Guiana, French North Africa, India, Iran, New Zealand. Obtainable from Publicity Division, Foreign Trade Service, Ottawa.

Reprints of Special Articles

Articles on the following subjects, published in *Foreign Trade,* have been reprinted in pamphlet form, and may be obtained from the Publicity Division, Foreign Trade Service, Ottawa:

Assistance Available from Trade Commissioners
Branch Plant Expansion Encouraged
Canadian Port Facilities Aid Foreign Trade
Canadian Toy Industry
European Recovery Program Related to Canadian Economy
Foreign Import Controls and Exchange Regulations
Import Control of Capital Goods Under Emergency Act
Industrial Development in Canada
Influence of Geography on Import Trade
Production of Sports Equipment in Canada
Trade Procedure for American and British Zones in Germany

Trade Bulletins and Reports

Detailed information on foreign trade is compiled by Dominion Bureau of Statistics, being issued on a monthly, quarterly and annual basis. The Dominion Statistician is also responsible for compilation of the *Canada Year Book;* the *Canada Handbook,* the *Canadian Statistical Review* and commodity reports. Catalogue of publications obtainable from Information Service, Dominion Bureau of Statistics, Ottawa.

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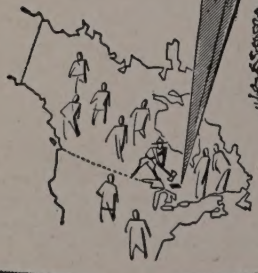

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